02 – Coupa Supplier Information Management

Contents

You can access the **Supplier Onboarding External Form** either by clicking on the **Pending Forms** button once you've created your Coupa Supplier Portal (CSP) account (see section 01 of the Training Pack) or at any time, by:

❑ logging in to your CSP account (https://supplier.coupahost.com/sessions/new)

❑ Going to: **Business Profile** >

❑ **Information Requests**:

1 Business Profile

2 Information Requests

coupa supplier portal

🏠 Invoices | Orders | **Business Profile** | Service Sheets | Items | ASN | Sour... | Forecasts

Business Profile | Profile Submissions | Legal Entities | Payment Methods | Information Requests | Perf...

Bank of Ireland

Select Custo...

Form Responses

View [All ⌄]

Form	Status	Created Date
3 Supplier Onboarding External Form MC	New	22/12/2025

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Once you click on the link **Supplier Onboarding External Form MC**, the form will open and you will need to fill in the information highlighted below (some of it will already be populated)

Bank of Ireland

Select Customer   Bank of Ireland

View All Responses

Supplier Onboarding External Form MC

Supplier Information
GreenTech Innovations Ltd

Fill in your details to get onboarded to Bank of Ireland

General Details

Message from Bank of Ireland
None

* Company Name (Legal Entity Name)

GreenTech Innovations Ltd

Secondary Name (Trading Name)

* Company Registration Number

RC123456

* Country of Incorporation

Ireland

Mandatory (*)

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* Primary Contact (Account Manager)

Contact Purpose

Select Some Options

* First name

Monica

* Last name

Miller

* Email address

* Phone Number

+353 1 234 5678

Do you wish to add other contacts?
○ Yes
● No
E.g., Sourcing Contacts

* Remittance Advice Email Address

(company/department e-mail address is recommended rather than individual)

* Purchase Orders Email Address

(e-mail address for receiving Purchase Orders)

* Have any of the Directors/Board members of the company ever been employed by Bank of Ireland?
○ Yes
● No

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The box **Local** should be left unticked.

For suppliers whose country of incorporation is Ireland, the **Tax Registrations** section will have two additional mandatory fields that are absent for other countries:

In the **Bank Details** section, select the first option if your bank account is in ROI or UK or if you operate in a region where IBAN is mandatory (SEPA region), or the second option for all other countries, and click on **Add Remit-To** to add your bank account information.

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Bank account type ➡️

Bank Details

* What type of bank account you wish to register
● ROI & UK
○ Others

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Add Remit-To Address ➡️

*Remit-To Addresses

Add one or more Remit-To Addresses by either filling out a new Compliant Invoicing Form or choosing an Existing Remit-To Address.

Add Remit-To

To avoid duplicating the information that you already provided upon registration, a window will open where you can select the bank account information already provided and the form will be populated with those details:

If you are using **more than one bank account** in your relationship with Bank of Ireland Group

You can add these additional bank accounts by clicking again on **Add Remit-To**:

The Payment Method window pops up again, but since it is a new bank account that you did not provide on registration, you will need to add it by clicking on **Add Payment Method** -> **Bank Transfers**

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If you are using **more than one bank account** in your relationship with Bank of Ireland Group (continued)

12 Complete all Bank account details required to process payments:

Save

13

For each bank account select the **Unique Branch Identifier** from the dropdown list:

NOTE: **If you cannot find your branch code in the dropdown list, kindly write to suppliers@boi.com,** do not select a value that does not match your branch code.

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* Unique Branch Identifier

Select ⌄

🔍

021000089 (Citibank - NYC)
185008 (CitiBank - London)
232323 (UBS AG - London)
304065 (Lloyds - Birmingham)
400602 (HSBC - London 3)
401160 (HSBC - London)
401276 (HSBC - London 2)
50330300 (BNY Mellon - London)
543001 (543001)
543045 (NatWest - Ringswoods)

Do you require an Intermediary Bank Account?
◉ Yes
○ No

* Intermediary SWIFT/Routing Number

* Intermediary Bank Name

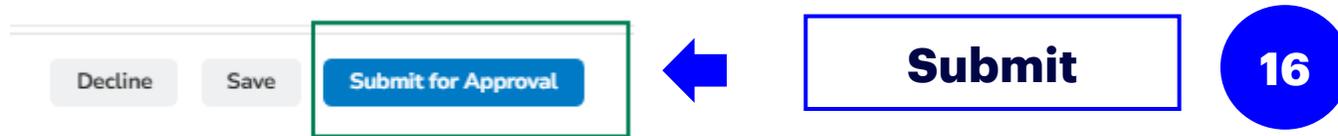* Intermediary Bank City

Intermediary Bank Account Number

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Finally, if you require an **Intermediary Bank** for your payments from BOI, you have the option to fill out the details by selecting **Yes** to the question below:
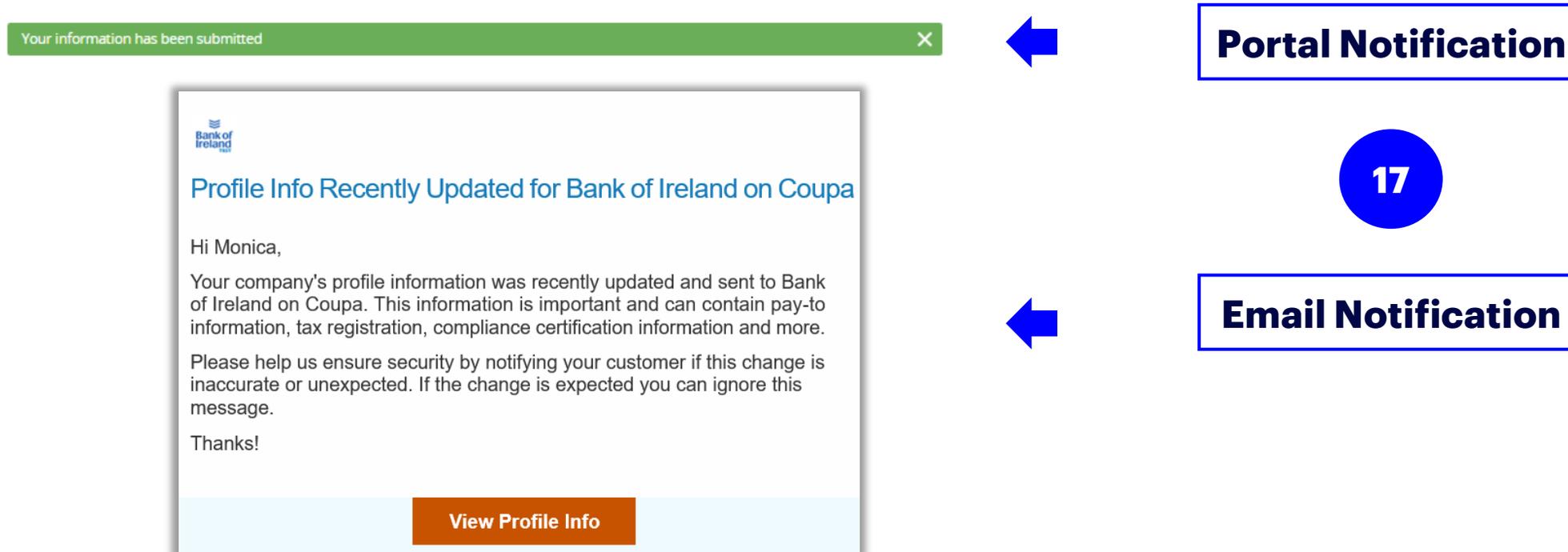
Once you have completed all the details, click on **Submit for Approval** to send the form to BOI team for validation.

Decline   Save   Submit for Approval

← **Submit** **16**

If there are no errors in your form, you will receive confirmation (in the portal and by email) that it has been successfully submitted.

Your information has been submitted ✕

← **Portal Notification**

Bank of Ireland

Profile Info Recently Updated for Bank of Ireland on Coupa

Hi Monica,

Your company's profile information was recently updated and sent to Bank of Ireland on Coupa. This information is important and can contain pay-to information, tax registration, compliance certification information and more.

Please help us ensure security by notifying your customer if this change is inaccurate or unexpected. If the change is expected you can ignore this message.

Thanks!

View Profile Info

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← **Email Notification**

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Once the form has been approved by Bank of Ireland Group, you will receive email confirmation regarding the approval:

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Bank of
Ireland

Profile Info submitted to Bank of Ireland was Approved

Hi

The company profile information that you submitted to your customer, Bank of Ireland 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.

View Profile Info

02.b. How to Update Supplier Information (1/6)

> **Whenever any of your supplier information changes**

E.g., bank details, physical address of the company, email address of the primary contact or PO email address, all updates need to be done from the above-mentioned **Supplier Onboarding External Form MC**, which you can find in your CSP account if you go to **Business Profile** -> **Information Requests**:

Click on the form link, scroll all the way to the bottom and click on **Update Info.**

You can only update a form that has been approved and is in **Applied** status, you cannot update it if it is still pending approval.

When you update the form, scroll down to the section that needs updating and **leave the data that is still valid unchanged**.

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NOTE: Whenever you update the form, you will need to reply again to the below question on conflicts of interest, as your previous answer is removed whenever you click on '**Update Info**':

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* Have any of the Directors/Board members of the company ever been employed by Bank of Ireland?

○ Yes
○ No

NOTE: If the bank details have changed and the data previously provided is no longer valid, in addition to adding the new details you need to also inactivate the old ones by going to the **Bank Details** section and setting the **Bank Details Status** to '*Inactive*' for the old bank details:

Bank Details Status

Bank Details Status

| Inactive | ⌄ |

Please choose "Inactive" if you wish to deactivate these banking details

You can then add your updated bank account information by selecting the first option if your bank account is in ROI or UK or if you operate in a region where IBAN is mandatory (SEPA region), or the second option for all other countries, and clicking on **Add Remit-To** to add your new bank account information.

Bank Details

* What type of bank account you wish to register

◉ ROI & UK
○ Others

*Remit-To Addresses

Add one or more Remit-To Addresses by either filling out a new Compliant Invoicing Form or choosing an Existing Remit-To Address.

Add Remit-To

02.b. How to Update Supplier Information (4/6)

If there are changes in your Bank Details, update all fields required to process payments:

For each bank account select the **Unique Branch Identifier** from the dropdown list:

NOTE: **If you cannot find your branch code in the dropdown list, kindly write to** suppliers@boi.com, do not select a value that does not match your branch code.

Bank Details

*Beneficiary Name

1023769-UAT_Supplier_3

This should match Company Name

*Bank Country/Region

Ireland

Bank Name

Bank Address

*Bank Account Number

123344566

*IBAN Number

IE29GFIE23456712345678

*Unique Branch Identifier

Select

Please search for your unique branch identifier. This could be a Sort Code, SWIFT Code, Routing Number or Bank Code.

If you cannot find your branch code, please e-mail the Vendor Maintenance Team at vmd@boi.com

*Account Currency

EUR

*Unique Branch Identifier

Select

021000089 (Citibank - NYC)
185008 (CitiBank - London)
232323 (UBS AG - London)
304065 (Lloyds - Birmingham)
400602 (HSBC - London 3)
401160 (HSBC - London)
401276 (HSBC - London 2)
50330300 (BNY Mellon - London)
543001 (543001)
543045 (NatWest - Ringswoods)

Do you require an Intermediary Bank Account?

○ Yes
○ No

* Intermediary SWIFT/Routing Number

* Intermediary Bank Name

* Intermediary Bank City

Intermediary Bank Account Number

Finally, if you require an **Intermediary Bank** for your payments from BOI, you have the option to fill out the details by selecting **Yes** to the question below:

Once you have completed all the details that needed updating, click on **Submit for Approval** to send the form to BOI team for validation:

Decline   Save   **Submit for Approval**

7

After the form has been approved by Bank of Ireland Group, you will receive email confirmation regarding the approval:

(8)

Bank of Ireland

Profile Info submitted to Bank of Ireland was Approved

Hi

The company profile information that you submitted to your customer, Bank of Ireland 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.

View Profile Info