
Providing your Company and Payment Details to HSBC

Procurement Processes

Supplier Guide



Onboarding Via Coupa

As part of HSBC's digital transformation, we are using Coupa to collaborate with suppliers and exchange documents.

Coupa is a user-friendly Procurement software and platform, which covers the entire procurement process from initiating sourcing activity and contracting through to purchase orders and invoicing. You will now receive an email notification when we request information from you to support the onboarding process.

This guide will help you to complete and submit the information request to onboard you as a supplier to HSBC.

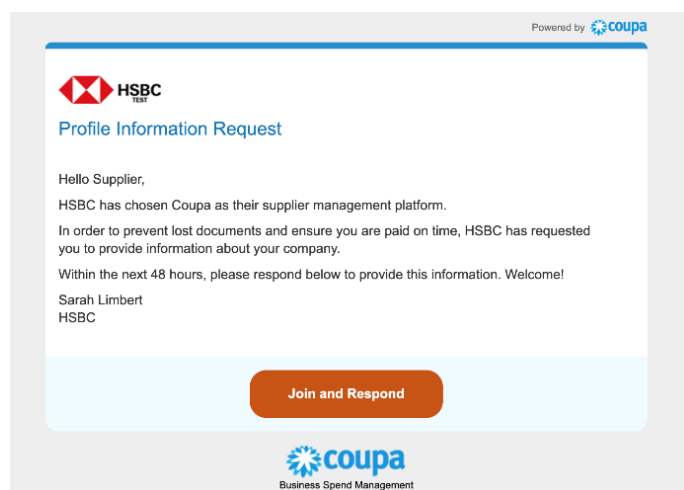
This guide includes steps for the registration of suppliers who are ready to provide their company payment details (source to pay – S2P).

Please ensure all information is accurate and if you are unsure about what information to enter, please ask your HSBC buyer before submitting

Step 1. Register to use Coupa Supplier Portal

When a supplier is being onboarded by HSBC an email explaining the purpose of the contact will be sent from Coupa

Select 'Join and Respond'



You will be prompted to Create an Account

The image shows a screenshot of the 'Create an Account' form in the Coupa Supplier Portal. The form is titled 'Create an Account' and includes a brief introduction: 'Coupa - HSBC is using Coupa to transact electronically and communicate with you. We'll walk you through a quick and easy setup of your account with Coupa - HSBC so you're ready to do business together.' The form fields are as follows: 'Business Name' (with 'Supplier Guide Ltd' entered), 'Email' (with 'tracy.whiting@hsbc.com' entered), 'First Name' (with 'Supplier' entered), 'Last Name' (with 'Contact' entered), 'Password' (with a note to use at least 8 characters and include a number and a letter), and 'Confirm Password'. There is a checkbox for 'I accept the Privacy Policy and the Terms of Use'. At the bottom, there is a blue 'Create an Account' button and a link for 'Already have an account? LOG IN'.

- Add your Legal Business Name
- Your email address and First Name/Last Name fields will be automatically populated
- Create a Password
- Click on the Privacy Policy and Terms of Use to review. Then click on the box to accept
- Click Create an Account

Click on the dropdown arrow and select Country/Region

- Add your Legal Registered Address
- Add City, State and Postal Code
- Click Next

Coupa Supplier Portal Onboarding
Fill out required info for your Business Profile before proceeding to Coupa Supplier Portal

Account Details Payment Information

Primary Address

* Country/Region * Address Line 1 Address Line 2

* City * State * Postcode

Next

Complete Coupa Supplier Portal Onboarding.

- HSBC only accepts Bank Transfer Payment type.
- Add Payment Method Name
- Add Bank Account Country/Region and State
- Add Bank Account Currency
- Add Account Number and Confirm Account Number and complete remaining fields as required.

Coupa Supplier Portal Onboarding
Fill out required info for your Business Profile before proceeding to Coupa Supplier Portal

Account Details Payment Information

Bank Transfer Customer Supported

Please enter the following information to receive Bank Transfer payments.

* Payment Method Name ⓘ

Bank Account

* Country/Region * State * Bank Account Currency

United States USD

Beneficiary Name Bank Name

Account Number ⓘ Confirm Account Number

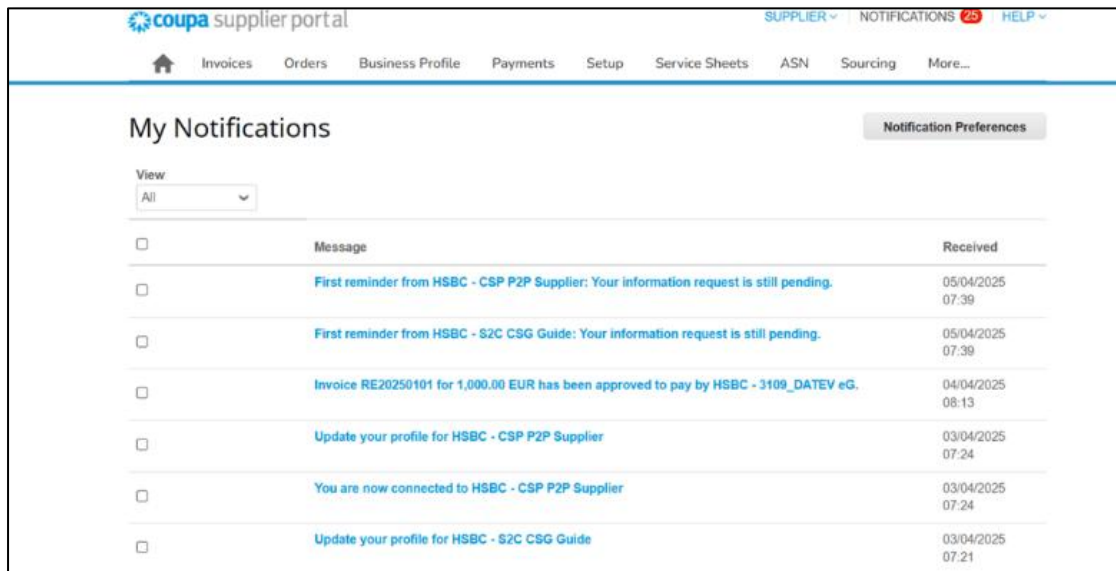
ACH Routing Number ⓘ Wire Routing Number ⓘ

☐ My company expects to receive urgent/wire payments

Step 2. Respond to HSBC Information Request

Accessing new requests for information if you have already registered for Coupa Supplier Portal
From Home Page, click on Notifications icon top right.

You will see Form Responses – these are information requests for you to respond to. You can check the Status and Submitted At to identify the new request for information.

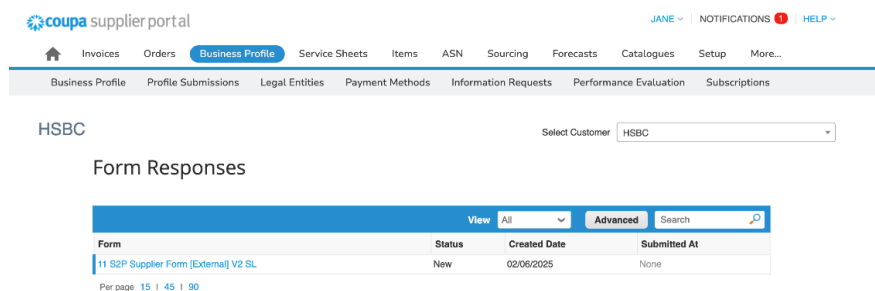


My Notifications

View: All

Message	Received
First reminder from HSBC - CSP P2P Supplier: Your information request is still pending.	05/04/2025 07:39
First reminder from HSBC - S2C CSG Guide: Your information request is still pending.	05/04/2025 07:39
Invoice RE20250101 for 1,000.00 EUR has been approved to pay by HSBC - 3109_DATEV eG.	04/04/2025 08:13
Update your profile for HSBC - CSP P2P Supplier	03/04/2025 07:24
You are now connected to HSBC - CSP P2P Supplier	03/04/2025 07:24
Update your profile for HSBC - S2C CSG Guide	03/04/2025 07:21

Alternatively, you can also navigate to Business Profile>Information Requests to see Form Responses – these are information requests for you to respond to.



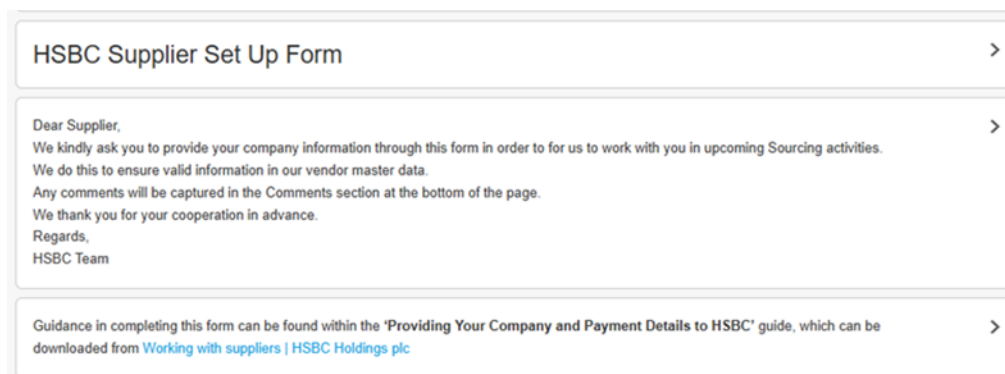
Form Responses

Select Customer: HSBC

Form	Status	Created Date	Submitted At
11 S2P Supplier Form [External] V2 SL	New	02/06/2025	None

Per page: 15 | 45 | 90

You will be directed to the HSBC Supplier Set Up Form.



HSBC Supplier Set Up Form

Dear Supplier,

We kindly ask you to provide your company information through this form in order to for us to work with you in upcoming Sourcing activities. We do this to ensure valid information in our vendor master data. Any comments will be captured in the Comments section at the bottom of the page. We thank you for your cooperation in advance.

Regards,
HSBC Team

Guidance in completing this form can be found within the 'Providing Your Company and Payment Details to HSBC' guide, which can be downloaded from [Working with suppliers | HSBC Holdings plc](#)

Code of Conduct

HSBC's Supplier Code of Conduct ('the Code') sets out HSBC's sustainability priorities and areas of focus in relation to HSBC's supply chain. It also sets out what is required from suppliers to support these areas. All HSBC suppliers must comply with the Code. Suppliers must also require their sub-contractors to meet the standards set out in the Code.

- Click, open and read the HSBC Code of Conduct & Data Privacy Notice
- Click the dropdown arrow and confirm you have read and will adhere to the HSBC Supplier Code of Conduct
- Enter reason for non-acceptance (if applicable)

HSBC Supplier Code of Conduct Acknowledgement

HSBC's Supplier Code of Conduct (the 'Code') sets out HSBC's sustainability priorities and areas of focus in relation to our supply chain. It also sets out what is required from suppliers to support these areas. All HSBC suppliers must comply with the Code. Suppliers must also require their sub-contractors to meet the standards set out in the Code. (Response required)

HSBC Code of Conduct & Data Privacy Notice

<https://www.hsbc.com/who-we-are/esg-and-responsible-business/working-with-suppliers>

Find pdf documents included in the HSBC Supplier Code of Conduct section

* I acknowledge the Data Privacy notice

* I have read and will adhere to the HSBC Supplier Code of Conduct above

Enter reason for non-acceptance of the Code of Conduct

If you have not accepted the HSBC Supplier Code Of Conduct enter your reasoning above

HSBC Supplier Details

Supplier Legal Name will be pre-populated

Complete as much information in the remaining fields as you can

Supplier Details

* Supplier Legal Name

3109_DATEV eG

Legal / Registered Name

* Display Name

S2C CSG Guide

Should mirror the Legal / Registered Name

Trading Name

Official name used for carrying out business which is different to Legal / Registered Name

Native Name

Name in local language (i.e non-Latin) if applicable

Date of Incorporation

dd/mm/yyyy

LTD company only

Country of Incorporation

United Kingdom

LTD company only

Commercial Registration/Company Number

Dun & Bradstreet (DUNS) Number

123456789

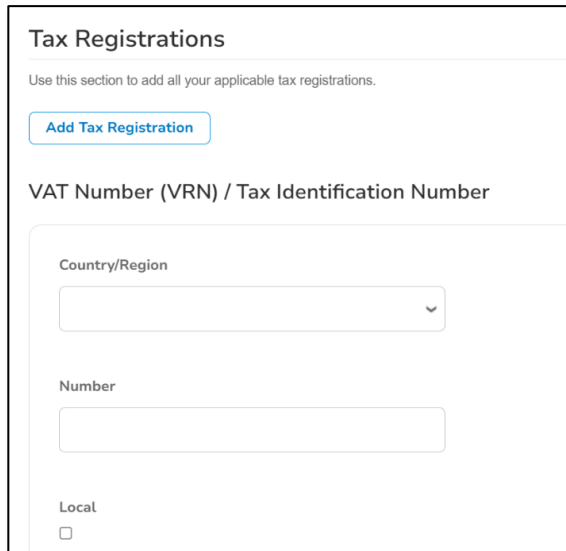
LTD company only

HSBC Tax Details

Click on Add Tax Registration

The following box will appear. Click on the dropdown arrow to select the Country

Add your Tax Number



The screenshot shows a form titled "Tax Registrations" with a subtitle "Use this section to add all your applicable tax registrations." Below this is a blue button labeled "Add Tax Registration". Underneath is the heading "VAT Number (VRN) / Tax Identification Number". The form contains three input fields: "Country/Region" with a dropdown arrow, "Number" (a long text box), and "Local" with a checkbox.

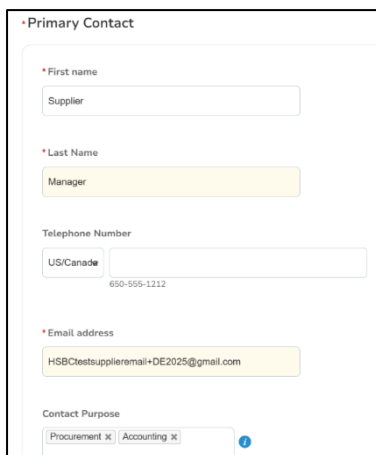
HSBC Primary Contact Details

First Name/Last Name will be pre-populated; add a contact Telephone Number (this can be left blank if preferred and is not mandatory)

Email address will be pre-populated

Click on the Contact Purpose field to select an option (this can be left blank if preferred and is not mandatory)

Please note: The details you entered for Coupa Registration will not be pulled through to the HSBC Form



The screenshot shows a form titled "Primary Contact". It contains several fields: "First name" with "Supplier" pre-filled, "Last Name" with "Manager" pre-filled, "Telephone Number" with a dropdown for "US/Canada" and a text box containing "650-555-1212", "Email address" with "HSBCtestsupplieremail+DE2025@gmail.com" pre-filled, and "Contact Purpose" with two radio buttons, "Procurement" (selected) and "Accounting". A blue information icon is next to the "Contact Purpose" section.

HSBC Parent Information

If you are a subsidiary supplier owned by a Parent Company, please click on the dropdown arrow and select Yes. You will be asked to add the name of your Parent Company.

Once this Form is submitted and approved by HSBC, this information is visible by our Procurement Team so that HSBC is aware of your Parent Company information.

Otherwise, select No and continue

Parent Information

* Do you have a Parent Company?

Select

HSBC Address Details

Click on the Address Purpose to select an option i.e. when HSBC is to use this address (this can be left blank if preferred and is not mandatory)

Address Details

* Registered Address

Address Purpose

Select Some Options

* Region

Country/Region

United Kingdom

State Region

Birmingham - BIR

State ISO Code

GB-BIR

Address Name

987 Main Street

* Street Address

Street 1

Street Address 2

Street Address 3

Street Address 4

* City

Birmingham

Other mandatory fields will be pre-populated. You can update these details if required

HSBC Remit and Bank Details

The Supplier Payment Account details you completed via the Registration Onboarding Wizard will be defaulted into the payment account fields. Please complete any remaining mandatory fields

* New Update Remit To Active Active Address Name * Street Address Paumgartnerstraße 6-14 Street Address 2 * City Nürnberg	Region Country/Region Germany State Region Bavaria - BY State ISO Code DE-BY * Postal Code 90329 * Remit-To Contact Email	* Account Currency EUR * Bank Name Commerzbank AG Bank State or Region * Bank Country/Region Germany * Beneficiary Name 3109_DATEV eG
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NB: For Supplier Payment Accounts, it is mandatory for you to provide the Banking Supporting Document. HSBC requires a letter from the vendor on their company letterhead saved in PDF format, stating the bank account information which has been selected for payments.

Bank Routing Number

Bank Wire Routing Number

Transit Number And Institution Number

• Banking Supporting Document

• Attachments

Supplier_Quote.pdf

Please note: If you are adding your Supplier Payment Account Details for the first time or changing your Supplier Payment Account details, you will need to submit your next invoice through the Coupa Supplier Portal to activate the new Supplier Payment Account. Future invoices can then be submitted via the Coupa Supplier Portal or via the email address you have used previously.

To add another Supplier Payment Account, click on Add Remit-To. As a reminder - HSBC only accepts Bank Transfer Payment Method.

When you add a Bank Transfer Payment Method for HSBC it will show as 'Customer Supported'. Other Payment Types will show as 'Unsupported by Customer'.

Select 'Add Payment Method'

Remit & Bank Details

• 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

How would you like to be paid?

All Methods Bank Transfers Cheques Credit Cards Add Payment Method

HSBC supports Bank Transfers Payments.

☐	Mizuho Bank 8D MELROSE STREET, Auckland, NEWMARKET 1023, New Zealand Account Number ****45678 Transit Code 001 Wire Routing Number	☆ Customer Supported
☒	Mizuho Bank 8D MELROSE STREET, Auckland, NEWMARKET 1023, New Zealand Account Number ****4567 Transit Code 123456 Wire Routing Number	Shared With Customer
☐	8D MELROSE STREET, Auckland, NEWMARKET 1023, New Zealand, New Zealand (89)	Unsupported by Customer

Cancel Add Selected

Environment, Supplier Inclusion and Human Rights

The following Environment, Supplier Inclusion and Human Rights sections require you to select all response options applicable to your organisation's current status. Please ensure you provide a response to each section, taking care not to select a 'None of the above is applicable' option with another response option within the same question.

HSBC Environment Details

Supporting the transition to net zero is a key priority for HSBC and we aim to achieve net zero in our own operations, travel and supply chain by 2050, in line with our overarching net zero ambition.

Please refer to HSBC's Supplier Code of Conduct for HSBC's requirements of suppliers in relation to carbon emissions and being a responsible consumer of natural resources. Further support and guidance can also be found within the 'HSBC Net Zero Guide for Suppliers' on [Working with suppliers | HSBC Holdings plc](#)

Note: Please take care to not concurrently select mutually exclusive options such as Option 1 and Option 2.

- Read through the Options and click on the Select Some Options Field.
- Hold Control to select multiple options

Environment

Please refer to HSBC's Supplier Code of Conduct for HSBC's requirements of suppliers in relation to carbon emissions and being a responsible consumer of natural resources. Further carbon reduction support and guidance for suppliers can also be found within the HSBC Net Zero Guide for Suppliers at the link below. Care must be taken to not concurrently select mutually exclusive response options (for example, Option 1 and Option 2, or Option 13 with another response option). (Response required)

Please refer to [Working with Suppliers](#) for further guidance.

Option 1. My company has targets in place to reduce Scope 1 & Scope 2 emissions by 50% or greater by 2030

Option 2. My company has targets in place to reduce Scope 1 & Scope 2 emissions by less than 50% by 2030

Option 3. My company has targets in place to reduce Scope 1 and 2 emissions by 2050.

Option 4. My company has targets in place to reduce Scope 3 emissions by 2050

Option 5. My company's carbon reduction target is a validated science-based target (SBTi)

Option 6. My company has an environmental management system (EMS) addressing our significant environmental impacts.

Option 7. My company's carbon emissions are independent third party assured.

Option 8. My company discloses Scope 1 and Scope 2 emissions publicly.

Option 9. My company discloses Scope 3 emissions publicly.

Option 10. My company can provide apportioned emissions to HSBC

Option 11. My company can provide product or service-level emissions specific to HSBC

Option 12. My company is willing to engage with HSBC to develop a Net Zero target (including Scope 3) for 2050 or earlier.

Option 13. My company is willing to engage with HSBC to develop a renewable energy target.

Option 14. My company has a nature and biodiversity policy or statement

Option 15. None of the above is applicable/available.

Please choose the options below that are applicable to your company

Hold Control to select multiple options

HSBC Human Rights & ESG Details

As set out in HSBC's Human Rights Statement (ESG reporting centre | HSBC Holdings plc), we recognise the role of business in respecting human rights. Our approach is guided by the UN Guiding Principles on Business and Human Rights and OECD Guidelines for Multinational Enterprises on Responsible Business Conduct. We expect our suppliers to uphold these same

standards, to not cause or contribute to adverse human rights impacts, and address impacts when they occur.

Please refer to HSBC's Supplier Code of Conduct on [Working with suppliers | HSBC Holdings plc](#) for HSBC's requirements of suppliers in relation to Human Rights.

- Read through the Options and click on the Select Some Options Field.
- Hold Control to select multiple options

Human Rights

Please refer to HSBC's Supplier Code of Conduct for HSBC's requirements of suppliers in relation to Human Rights. Care must be taken to not to select the 'None of the above is applicable/ available' response option concurrently with another response option within the same section. (Response required)
Please refer to [Working with Suppliers](#) for further guidance .

Option 1. My company has a public Human Rights Policy or Statement.
Option 2. My company has a grievance mechanism to report human right violations.
Option 3. My company conducts human rights due diligence in our supply chain.
Option 4. My company has a public Modern Slavery Policy Statement
Option 5. None of the above is applicable/available.

Please choose the options below that are applicable to your company.
Hold Control to select multiple options

HSBC Supplier Inclusion

HSBC wants to ensure our suppliers represent our employees, our customers and the communities we serve to create a world of opportunity. We believe that creating a diverse supply chain drives innovation and increases our agility and adaptability. HSBC aims to ensure that inclusion is recognised in the goods and services we buy from suppliers, and that supplier teams providing services to HSBC are diverse and the goods and services suppliers deliver are equally accessible to everyone. Supplier Inclusion at HSBC refers to the practice of ensuring equal opportunities for diverse owned businesses to compete for contracts.

Please refer to HSBC's Supplier Code of Conduct on [Working with suppliers | HSBC Holdings plc](#) for HSBC's requirements of suppliers in relation to diversity and inclusion.

- Read through the Diversity Consent Statement and select your Consent Feedback

Diversity Consent Statement

To further support one of the bank's core values, we value difference, and Global procurement's target of increasing our spend with diverse suppliers – we are now adding supplier diversity questions to Coupa Supplier Information Module (SIM). This will enable us to identify diverse suppliers in our supply chain and meet the Sustainable Procurement Mandatory Procedure of always including one diverse supplier in our commercial events.

You consent to HSBC's use of the Supplier Diversity Data that you provide in response to the diversity questions after registering in Coupa for the purpose of assessing and managing the diversity in the HSBC Supplier Portal in accordance with the terms of HSBC's [Data Privacy Notice to Suppliers](#) and to the inclusion of that data in the HSBC Supplier Diversity data base.

You confirm that you are authorised by any individual whose data you submit to Coupa, and have obtained consent from such individuals for HSBC's processing and use of such data, including the answers to the diversity questions and have provided the HSBC's [Data Privacy Notice to Suppliers](#) to such individuals and informed that the data will be used by HSBC in this way.

You also acknowledge by your continued use and engagement with Coupa:

-that any further information that you submit to Coupa will be processed by HSBC for the purposes set out in and in accordance with the terms of HSBC's [Data Privacy Notice to Suppliers](#); and you confirm that you are authorised by any individual whose data you submit to Coupa and have obtained consent from such individual's for HSBC's processing and use of such data, including the answers to the diversity questions and have provided the HSBC [Data Privacy Notice to Suppliers](#) to such individuals and informed that the data will be used by HSBC in this way.

Please note that consent can be withdrawn at any time by emailing hsbc.supplier.diversity@hsbc.com. If consent is withdrawn, HSBC will no longer have the right to collect additional data and any data collected up to the time of withdrawal will be kept for the time necessary. Please also reach out to this email address with any questions in relation to Supplier Diversity Data

"I give my consent based on the above consent statement."

*** Consent Feedback**

Select

Please select one option

- Read through the Options and click on the Select Some Options Field.
- Hold Control to select multiple options

Supplier Inclusion
>

Please refer to **HSBC's Supplier Code of Conduct** for HSBC's requirements of suppliers in relation to Diversity and Inclusion. Care must be taken to not to select the 'None of the above is applicable/ available' response option concurrently with another response option within the same section. (Response required)
Please refer to [Working with Suppliers](#) for further guidance .
>

Option 1. My company is a diverse owned company (51% or more owned, managed and controlled by a historically and locally under-represented group). Please note that this option relates to the ownership of the company.
Option 2. My company has a supplier diversity program to increase spend with diverse owned companies (51% or more owned, managed and controlled by a historically and locally under-represented group) in our supply chain. Please note that this option relates to the ownership of the companies in your supply chain.
Option 3. My company is a Small, or Medium Sized Enterprise (SME) based on country definition of an SME where my company is located.
Option 4. My company has a policy that prohibits discrimination, bullying or harassment in the workplace.
Option 5. None of the above is applicable/available.
>

Please choose the options below that are applicable to your company.
Hold Control to select multiple options
>

HSBC Sustainability Contact

Add a Contact Name and select Contact Purpose.

- Read through the Options and click on the Select Some Options Field.
- Hold Control to select multiple options

Please provide a contact point for sustainability related matters

First name

Surname

Work Phone

US/Canada

650-555-1212

Email address

Contact Purpose

Select Some Options
i

Review details and Submit to HSBC

Review Contact Details and click Submit for Approval. You can also click on Save if you want to return to the Form to review before submitting for approval

Decline

Save

Submit for Approval

You will see a Green banner which confirms your information has been submitted to HSBC and is Pending Approval. You will receive an email confirmation that your Supplier Profile information has recently been updated in Coupa.

Support

Process-related queries can be raised with your HSBC Buyer.

Technical questions related to the system functionality should be raised with Coupa Support via:

1. Email: supplier@coupa.com
2. Web Chat: Chat Bubble post login to CSP (available 24x5)
 - a. Select the persistent chat bubble in the lower-right corner of the Coupa Supplier Portal.
 - b. Provide your contact information: first name, last name, email address, and phone number (optional). Then, select the type of issue you are having from the drop-down list.
 - c. If you are logged in to the CSP, your contact information is pre-populated, but you can modify it.
 - d. Select Start Conversation.

