



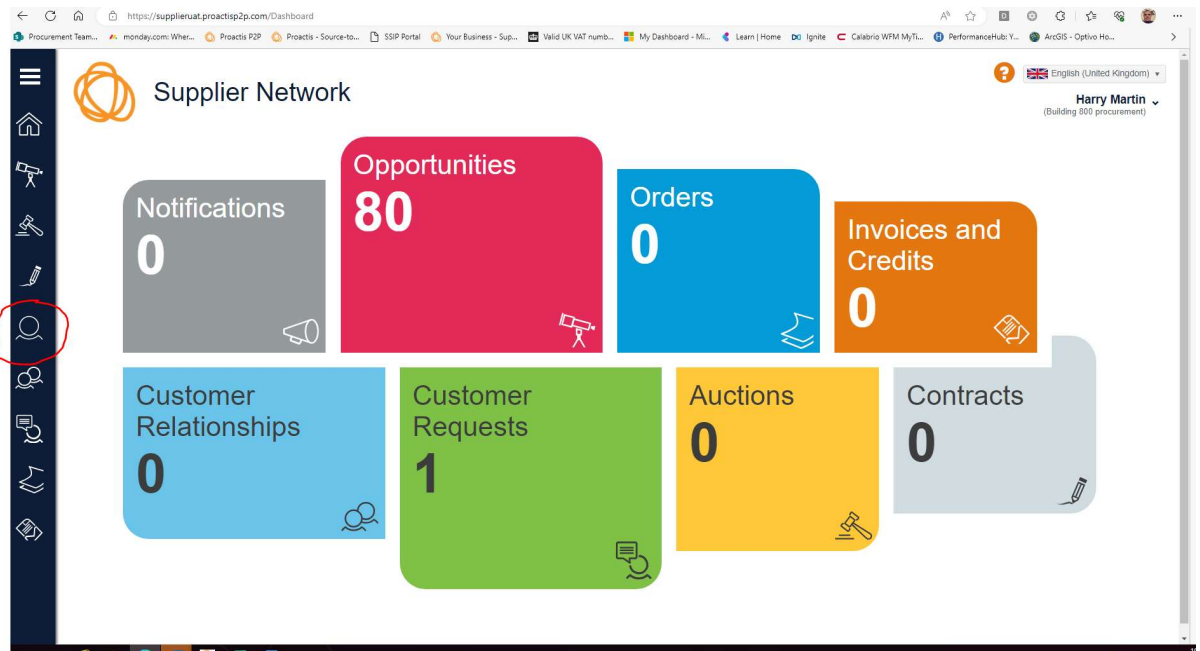
Procurement

SUPPLIER RELATIONSHIP MANAGEMENT



Updating Bank details in SRM

1. Log into your account, from the home screen click the customer icon on the left-hand side of the screen which has been circled red.



2. Then it'll bring up this screen where you need to click edit.



Your Customers

From here you can search for and manage your customers and customer-specific information.

Search by customer name...

Search

+ Customers (38)

Customer Name	Primary Contact	Address	Town	Status	Show Me
Optivo	Admin Administrator	Building 800, Guillat Avenue, Kent Science Park	Sittingbourne, UNITED KINGDOM	Reviewed	

Documents

No documents found

Customer Contacts

No customer contacts found

Edit

Relationships



Procurement

SUPPLIER RELATIONSHIP MANAGEMENT



3. Finally, that'll bring up the screen below which is where you can update your bank details.

☰

Home

🔍

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Edit Customer Information

⬅ Back

✓ Save

English (United Kingdom)

Harry Marti

(Building 800 procureme)

From here you can amend customer specific information for Optivo.

Additional Data

Additional Data

Bank Account Name: *

Bank Account Number: *

Bank Name: *

Bank Branch:

Bank Sort Code: *

Payment Method:

Payment Terms:

*

Bank Details : Add PDF of the following information on company letter headed paper; bank name, account no. sort code and account name.

Health & Safety: Has your organisation been subject to enforcement action (e.g Prosecution, prohibition notice or improvement notice) under Health & safety legislation in the last five years? *

Health & Safety: Will your company be working on any building, land or service owned, managed or occupied by Optivo? *

Health & Safety: If yes to above, is the company a member of the umbrella pre-qualification scheme Safety Schemes In Procurement (SSIP)? If so please add to Document *

Health & Safety: Will you be working from heights? *

Modern Slavery : Do the modern slavery provisions relate to your company? *

Modern Slavery: If yes, please provide the URL to your current slavery and human trafficking statement

Modern Slavery: If your statement is not published online please upload document

Financial Details: What is your annual turnover?

4. Please upload a copy of the new bank details in the document section on a company headed PDF.