



Supplier Data Maintenance

Supplier Data Change Request/Data Modification

Supplier Guide

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Table of Contents

1.	Introduction.....	2
2.	Purpose of the document	2
3.	Change Request/Modification	2
4.	Supplier Roles	2
5.	Process Handoff (Upstream/Downstream)	3
6.	List of Mandatory Documents required for Change Request/Modification of Supplier Data	3
7.	List of Non-Mandatory Documents.....	3
8.	Important Links	3
9.	Step by Step procedure -Screen guide in MyShops20 /Ivalua	4
10.	Glossary:	13
11.	Status of the Ivalua Request and what they mean:	13
12.	Frequently Asked Questions: (From suppliers).....	13

1. Introduction

This Document is prepared for all suppliers who is required to furnish Data as part of Modification/Change in their information (Bank/Address/Name change/Contact details change) as a supplier in Credit Suisse

2. Purpose of the document

The purpose of this document is to outline the step-to-step process guide for suppliers to provide accurate information/documentation in Myshop S20/iValua as part of Supplier Data Modification.

3. Change Request/Modification

The Change Request/Modification of Supplier data will include the below items.

- Change in Supplier Address/Contact details/Emails
- Change/Update of Bank Details
- Change of Name/Merger/Acquisition
- Reactivation of Supplier

Please do attach all required documents while completing the change request .

4. Supplier Roles

There are 2 roles assigned to the supplier contact :

a) Supplier Admin :

- 1 Only one contact within the organization can have supplier admin role.
- 2 Can assign the admin responsibility to another contact but will then cease to be the supplier admin.
- 3 Can assign Supplier Profile Manager Role to another contact
- 4 Must attest when requested by Credit Suisse that all contacts who have access to the iValua tool are active / genuine and are associated with the company

b) Supplier Profile Manager

1. Can submit the details requested for onboarding.

5. Process Handoff (Upstream/Downstream)

Process Handoff	
From?	What?
Requester/IBP/User	Request for Supplier Data Modification submitted via MyShop S20
Supplier	Supplier completes the information required
SDM	Supplier Data Modification completion in MyShop

6. List of Mandatory Documents required for Change Request/Modification of Supplier Data

The below are list of mandatory documents that need to be attached in Supplier set up >Documents section in MyshopS20 if the billing entity is for the below countries

Country	List of Mandatory Document
India	PAN Card copy
US	Form W9, CA590 -For California based vendors; C503 – Charity & Donation Vendors
Global-Bank Change/Update	Bank letter stating the bank details/ Company Letter head stating the bank details/ Fapiao slip/ Bank Excerpts/Statement/Void Cheque.

7. List of Non-Mandatory Documents

These documents are good to have, though not mandatory.

Country	List of Documents
Global	VAT Registration Document/ TAX ID/ Registration Certificat
US	W8 – as applicable
India	MSME Certificate/Declaration

8. Important Links

As an effort towards Digitization on the supplier onboarding process, all supplier onboarding will be initiated via the lvalua supplier portal only.

The Requester i.e., your Credit Suisse Business Partner would have initiated the change request/modification of Data and subsequently submitting the request to you via the MyShopS20/lvalua.

As a supplier you would receive an automated email stating this is received from Credit Suisse Buyer/Requester (ending with @ivalua) with all login credentials to log on to lvalua.

Please click on the link to log in to lvalua using the two-facto authentication. This log in password is one time use only.

Should you have issues in your log in credentials , please reach out to our support team on the below link:

sdml2support.myshops2o@credit-suisse.com

Click on the extranet page on the link below under supplier onboarding:

[Supplier – Credit Suisse \(credit-suisse.com\)](https://credit-suisse.com)

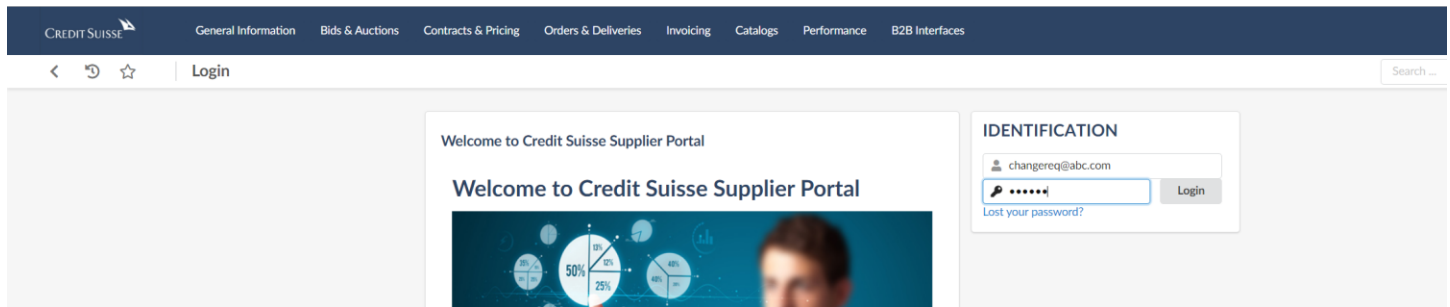
9. Step by Step procedure -Screen guide in MyShops20 /Ivalua

For a new user as the Supplier SSF Admin, you need to be familiarized with the General Terms of Use. Note your entity/company name on the right-hand top corner as highlighted here. Click on the acknowledgement and proceed. (Assuming the supplier's name here is SSF S.)

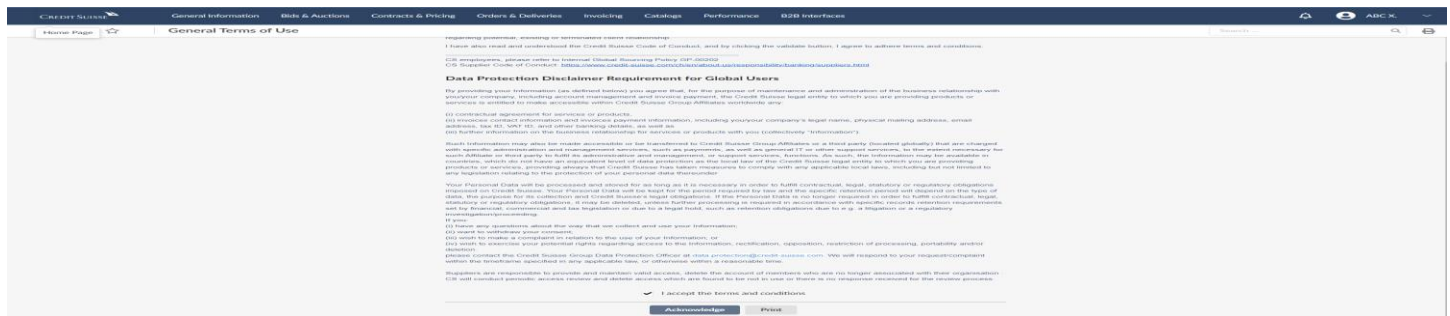
Please user another screen shot which has the revised verbiage

Log on to the Ivalua/MyShop S20 as shown below using the credentials as per the email received from Credit Suisse (look for an email ending with @ivalua) Once you enter the password as shown below, click on Login and another screen will be prompted for a verification code.

The verification code will be generated at this time and you are required to immediately check the email and input the verification code.



Click on the acknowledgement after reading through the disclaimer



Once the verification code is input , the below screen will show up. Now Click on to the Change Request Edit button as shown.

Broadcast Message from CS
Recent adverse publicity means that Credit Suisse is featuring more highly in the minds of cyber-criminals. You should be alert to fraudulent e-mails purporting to be from UBS or Credit Suisse requesting personal details or work content. If you receive any such requests or any data sharing requests that appear unusual, please contact your relationship manager for guidance.

Validations 1 Results

Assigned to	Type of Request	Label	Task to Perform	Forwarded on
	Supplier : change request V3	0000069791 - STUDIO IKON (INDIA)	Supplier Contact - SSF Admin	9/6/2023

Onboarding Progress

- Bidder Onboard Pending
- Draft Gather Information
- Validation Pending Review Information
- Inactive
- Activated Onboard Complete
- Unapproved

Open the change request and go through all the fields to take note of the change request in the field “Select the changes you want to make”

Change Request Comments

Change Request Status: crt

Check the Requestor type: Internal

Original supplier ID: STUDIO IKON

Original company info: 162203

Select the changes you want to make? Add New Address, Add New Bank Account

Reason for change request: Request to Add New Bank detail and address

Supplier Comments for Change Request

Basic Company Info

If any change in Tax/VAT id, pls Connect with your Credit Suisse business partner to initiate a new supplier setup request.

Status:

Supplier Legal Entity Name *

Supplier Additional Name

Is Trading Name/ Doing Business As Name Different from Legal Entity Name? *

Registered Address of Supplier

Name - Additional

Address line 1 *

Address line 2

Address Line 3

Note the pop-ups and start filling in the data

Company Change Request

Search ...

Save Save & Close Reject Submit

- ⚠ Is Trading Name/ Doing Business As Name Different from Legal Entity Name? must have a value
- ⚠ Any Other Tax ID applicable? must have a value
- ⚠ Address line 1 is not formatted correctly
- ⚠ Address Line 3 is not formatted correctly
- ⚠ Address Line 4 is not formatted correctly
- ⚠ Country Code must have a value
- ⚠ Phone Number must have a value
- ⚠ Email ID must have a value

Change Request Comments

Change Request Status

crt

Check the Requestor type

Internal

Original supplier ID

STUDIO IKON [link](#)

Original company info

162203

Select the changes you want to make?

Add New Address, Add New Bank Account

Reason for change request

Request to Add New Bank detail and address

Supplier Comments for Change Request

Add all Address information:
 Please note- The data needs to be filled in as per what change request has been mentioned.

Click on the Add PurchaseOrder/Remittance Order and add the address

Address Line 1	Address Line 2	Address Line 3	Address Line 4	Country	State	City	Zip Code	Province
A 19 KPCT MALL/FATIMA NAGAR, WANWORIE	NEXT TO VISHAL MEGA MART			INDIA		Pune	411013	
3 C 102 Surobhi Regency	Sopan Baug Extension	Off B T Kawade Road		INDIA	Maharashtra	Pune	411001	
T62 STATION FAMILY CAMP, SHOPPING COMPLEX	SIR MANEKJI ROAD			INDIA		PUNE	411001	

Now click on Add Banking information and add the bank details

Company Change Request

Information

Please update your company banking information in "Add Banking Information" tab.

After updating the banking information, please Save and then navigate to "Currency and Country" details and map your Purchase Order and Remittance address, Banking Information and Save the record.

Please note :- Mapping above information is mandatory in order to make a successful payment.

Original supplier ID
STUDIO IKON

Change Request Status
crt

Banking Information

+ Add Banking Information

Bank Name	Bank Account Number	Supplier Beneficiary Account Name	Bank Country
HDFC BANK LTD	[REDACTED]		

1 Result(s)

Bank Account & Address Mapping

Location Sequence Number	Credit Suisse Bill to Currency	Credit Suisse Bill to Country	Bank Name	Location Description	Order Address	Remittance Address
	INR	INDIA	HDFC BANK LTD	INR - IND - IND	T62 STATION FAMILY CAMP, SHOPPING COMPLEX	

1 Result(s)

Company Change Request

Banking Information

Supplier Status

Bank Name *
CITI BANK

Supplier Beneficiary Account Number *
8451231

Supplier Beneficiary Account Name *
STUDIO IKON

Branch Name *
Pune

Branch ID

Bank ID

Bank Country *
INDIA

Account Type *
Check

BIC/Swift Code

IFSC Code
CITI0000006

Is IBAN Applicable ? *
No

The bank details updated thus will be shown as below:

Company Change Request

Information

Please update your company banking information in "Add Banking Information" tab.
 After updating the banking information, please Save and then navigate to "Currency and Country" details and map your Purchase Order and Remittance address, Banking Information and Save the record.
Please note :- Mapping above information is mandatory in order to make a successful payment.

Original supplier ID
STUDIO IKON

Change Request Status
crt

Banking Information

+ Add Banking Information

Bank Name	Bank Account Number	Supplier Beneficiary Account Name	Bank Country
HDFC BANK LTD	[REDACTED]		
CITI BANK	STUDIO IKON	8451231	INDIA

2 Result(s)

Bank Account & Address Mapping

Location Sequence Number	Credit Suisse Bill to Currency	Credit Suisse Bill to Country	Bank Name	Location Description	Order Address	Remittance Address
	INR	INDIA				

After updating the Bank Information, please save the data. Now click on the edit icon under the tab Bank Account and Address Mapping as how below.

Company Change Request

Information

Please update your company banking information in "Add Banking Information" tab.
 After updating the banking information, please Save and then navigate to "Currency and Country" details and map your Purchase Order and Remittance address, Banking Information and Save the record.
Please note :- Mapping above information is mandatory in order to

Original supplier ID
STUDIO IKON

Change Request Status
crt

Banking Information

+ Add Banking Information

Bank Name	Bank Account Number	Credit Suisse Bill to Country	Credit Suisse Bill to Currency
HDFC BANK LTD	[REDACTED]	INDIA	INR Indian Rupee
CITI BANK	STUDIO IKON		

2 Result(s)

Bank Account & Address Mapping

Location Sequence Number	Credit Suisse Bill to Currency	Credit Suisse Bill to Country	Bank Name	Location Description	Order Address	Remittance Address
	INR	INDIA				

Add Currency and Country

Remittance Address *
Order Address *

Location Details
Bank Information *

Credit Suisse Bill to Country
Credit Suisse Bill to Currency

The drop down will show the address and the bank account that has just been added. Please choose the correct option from the drop down from the fields " Order Address, Remittance Address and Bank Information. Once done , save and close this window.

CREDIT SUISSE | General Information | Bids & Auctions | Contracts & Pricing | Orders & Deliveries | Invoicing | Catalogs | Performance | B2B Interfaces | ABCX

Company Change Request

Save Save & Close Reject Submit

Information

Please update your company banking information in "Add Banking Information" tab.
 After updating the banking information, please Save and then navigate to "Currency and Country" details and map your Purchase Order and Remittance address, Banking Information and Save the record.
 Please note :- Mapping above information is mandatory in order to make a successful payment.

Original supplier ID
STUDIO IKON

Change Request Status
crt

Banking Information

+ Add Banking Information

Bank Name	Bank Account Number
HDFC BANK LTD	[REDACTED]
CITI BANK	8451231

2 Result(s)

Bank Account & Address Mapping

Location Sequence Number	Credit Suisse Bill to Currency	Credit Suisse
	INR	INDIA
	INR	INDIA

2 Result(s)

Add Currency and Country

Remittance Address * - "ABC" Order Address * - "ABC"

Location Details Bank Information *
CITI BANK - 8451231

Credit Suisse Bill to Country Credit Suisse Bill to Currency
INDIA INR Indian Rupee

Bank Name	Bank Account Number	Supplier Name	Country
HDFC BANK LTD	[REDACTED]	STUDIO IKON	INDIA
CITI BANK	8451231		

2 Result(s)

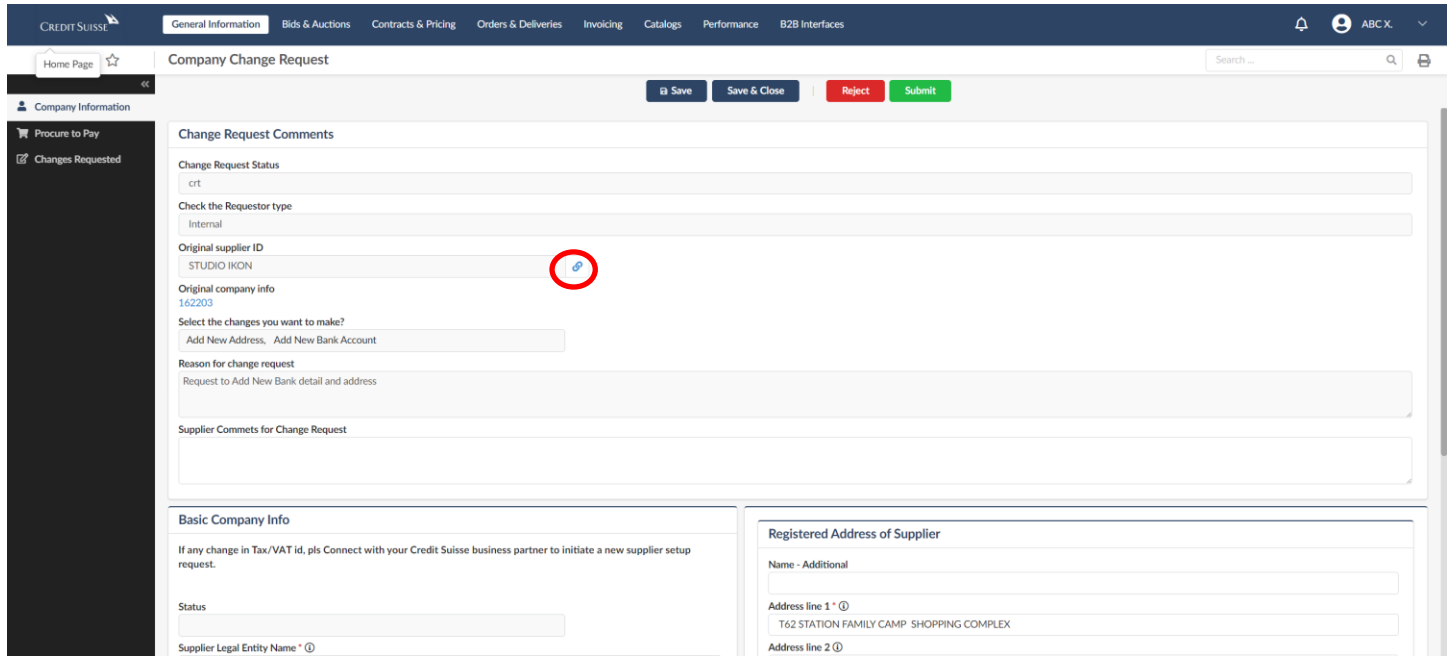
Bank Account & Address Mapping

Location Sequence Number	Credit Suisse Bill to Currency	Credit Suisse Bill to Country	Bank Name	Location Description	Order Address	Remittance Address
1	INR	INDIA	HDFC BANK LTD	INR - IND - IND	T62 STATION FAMILY CAMP, SHOPPING COMPLEX	
2	INR	INDIA	CITI BANK	INR-IND-IND	ABC	ABC

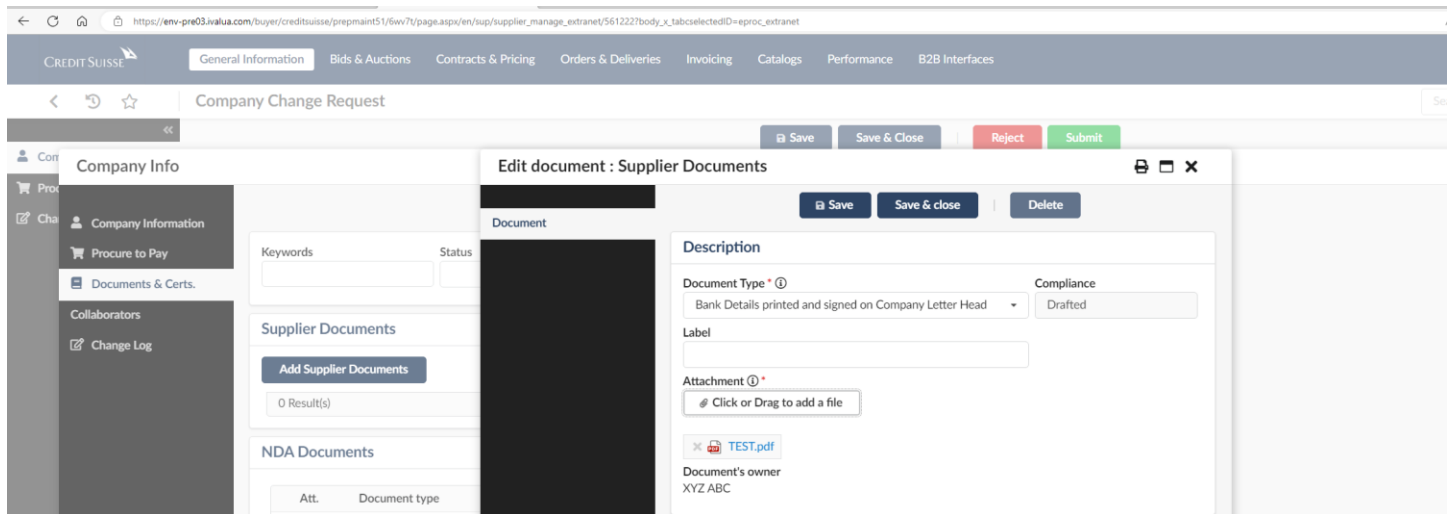
2 Result(s)

Once the mapping is done the screen will look like this one above . The Bank account and address mapping is mandatory to be done when you have a new bank account to be updated.

Click on the attachment icon as shown below to attach the required documents. (For eg: Any one of the following documents for a bank change/update)
 A letter from the vendor bank stating their Bank details/ Vendor bank accounts details on the Company Letter Head/Bank statement/ Bank Except/ Fapiao Slip/ Void check.



Attach the documents as shown below by clicking on Add Supplier Documents:



Please note the hover overs for all document attachments

The screenshot shows the 'Company Change Request' form in the 'Supplier Documents' section. The form includes a search bar with 'Keywords', 'Status', and 'State to date' (9/6/2023) fields. Below the search bar is the 'Supplier Documents' table with columns: Att., Document type, Title, Begin validity date, End validity date, Owner, Status, and Validity. A single document is listed: 'Bank Details printed and signed on Company Letter Head' with owner 'ABC XYZ', status 'X', and validity 'G'. Below the table is the 'NDA Documents' section.

Now click on the Submit button

The screenshot shows the 'Company Change Request' form in the 'Change Request Comments' section. The form includes fields for 'Change Request Status' (crt), 'Check the Requestor type' (Internal), 'Original supplier ID' (STUDIO IKON), and 'Original company info' (162203). Below these fields is a section for 'Select the changes you want to make?' with options 'Add New Address' and 'Add New Bank Account'. The 'Reason for change request' field contains the text 'Request to Add New Bank detail and address'. The 'Supplier Comments for Change Request' field is empty.

Data is now validated successfully. Please do submit the data before as show above.
The request will be not in your queue anymore.

The screenshot shows the 'Company Change Request' form with a success message at the top: 'Data has been saved' and 'Validated successfully'. The form content is identical to the previous screenshot, showing the 'Change Request Comments' section with the same fields and values.

10. Glossary:

Requester/User/IBP-	The Internal Business Partner in Credit Suisse or the user who will raise the request in Ivalua for the supplier set up
SSF	Supplier set up form
SDM	Supplier Database Maintenance (Supplier onboarding team)

11. Status of the Ivalua Request and what they mean:

Status on the Browse Supplier page on Ivalua	Status -What does it mean ?
Supplier Approval in Progress	The form/request has reached the supplier and is pending for his action.
SDM Approval in Progress	The request is successfully submitted by the supplier and has reached Credit Suisse for further action

12. Frequently Asked Questions: (From suppliers)

Ques.1 My Login password is not working/ expired. How can I get a new one?

Ans. 1 Please email to sdml2support.myshops2o@credit-suisse.com for all login issues.

Ques. 2 Can this login be used multiple times?

Ans. 2 Yes, the log in password can be used again via two facto authentications. Everytime you input the password and hit login button , a one time verification code will be triggered. Look for this verification code email just as you login . The verification code must be input immediately once the login is done.

Ques.3 Can I recall the forms that is submitted already to Credit Suisse?

Ans. 3 Forms once submitted cannot be recalled. It is extremely important that all information is checked before submission. If any information is awaited, you may save and close the form and fill it later. If you still have missed any information, please contact the Credit Suisse Business Partner.

Ques. 4 A second email notification is received from Credit Suisse? What is this for?

Ans .4 This would mean that after Credit Suisse reviewed the request you submitted, there is a clarification or more information needed. You can see the details in the comments and act accordingly and submit it again for review.

Ques. 5 I already have a bidder ID within CS. Do I still need to fill in the forms for onboarding?

Ans. 5 Yes, bidder ids will be converted to Supplier ids and activated for contract/business purpose.

Once you receive the request from Credit Suisse for onboarding, please log on to IValua using the 2-facto authentication and complete the forms.

Ques. 6 Can I send documents/ or any other information to Business Partner in Credit Suisse for onboarding via email?

Ans. 6 No, all new supplier onboardings must be completed via the IValua portal only.

Ques. 7 Documents are not getting attached? What should I do?

Ans. 7 Please read the hover over instructions for attachments. Also please note that the name is displayed on the right top hand of the iValua portal when you log in. If you have had previous profiles, you need to select the correct and the recent profile. The validation button should be green once the documentation is attached. The red cross mark will be verified internally by Credit Suisse. If the problem persists, please write to GG Myshop S2O SDM L2 Support sdml2support.myshops2o@credit-suisse.com