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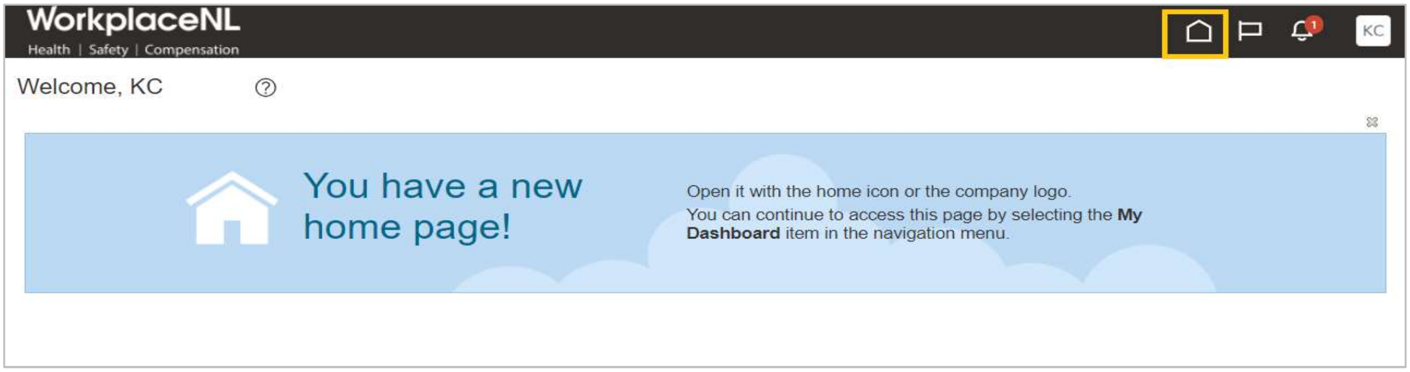
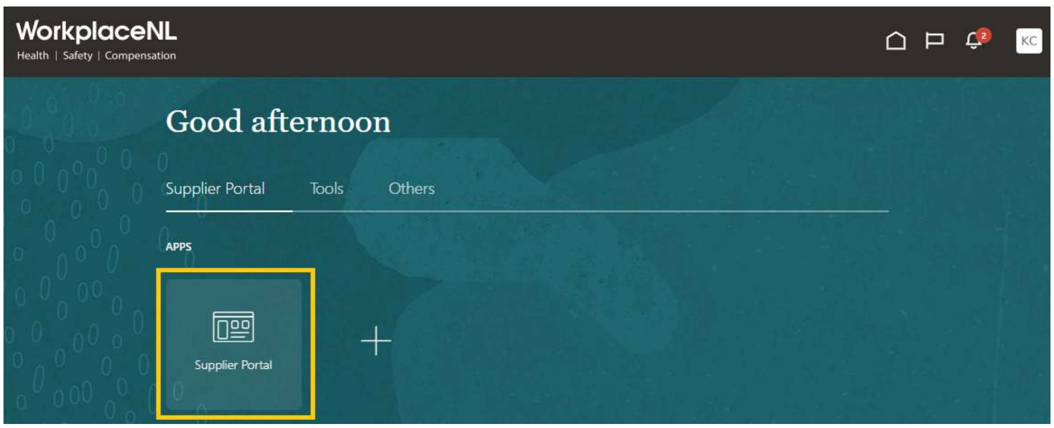
Managing Your Company Profile

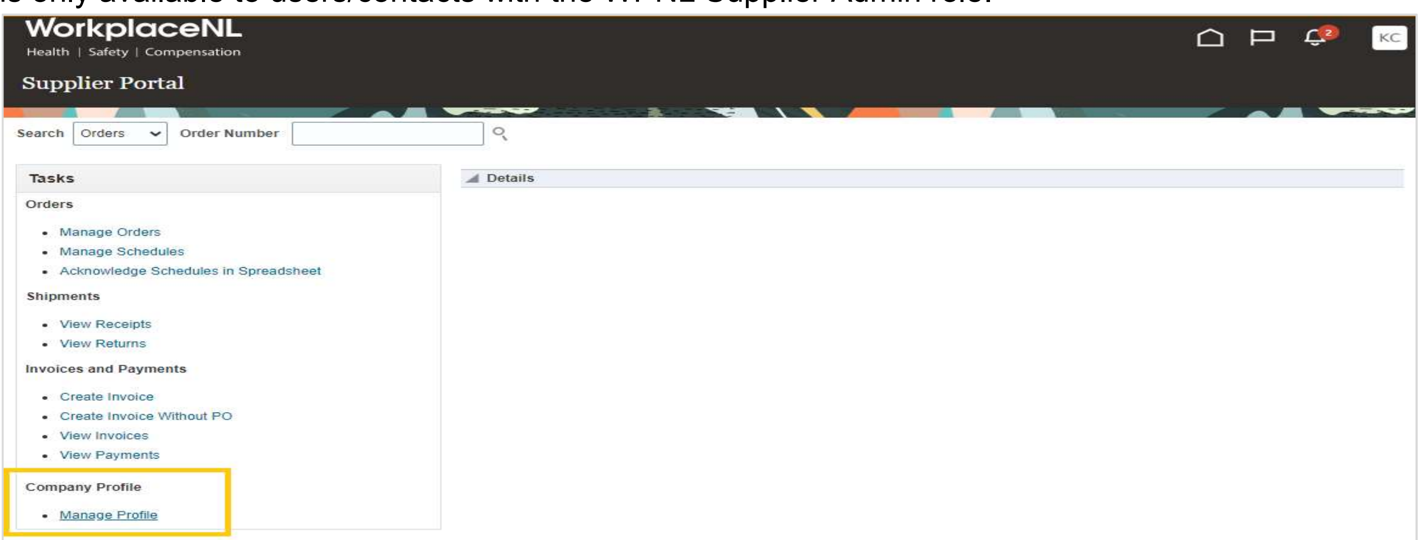
Users with the "WPNL Supplier Admin" role can update and maintain your supplier profile. You will be able to update banking details, create and edit contacts, and edit your address.

After you log in, select the home icon and then **Supplier Portal**.

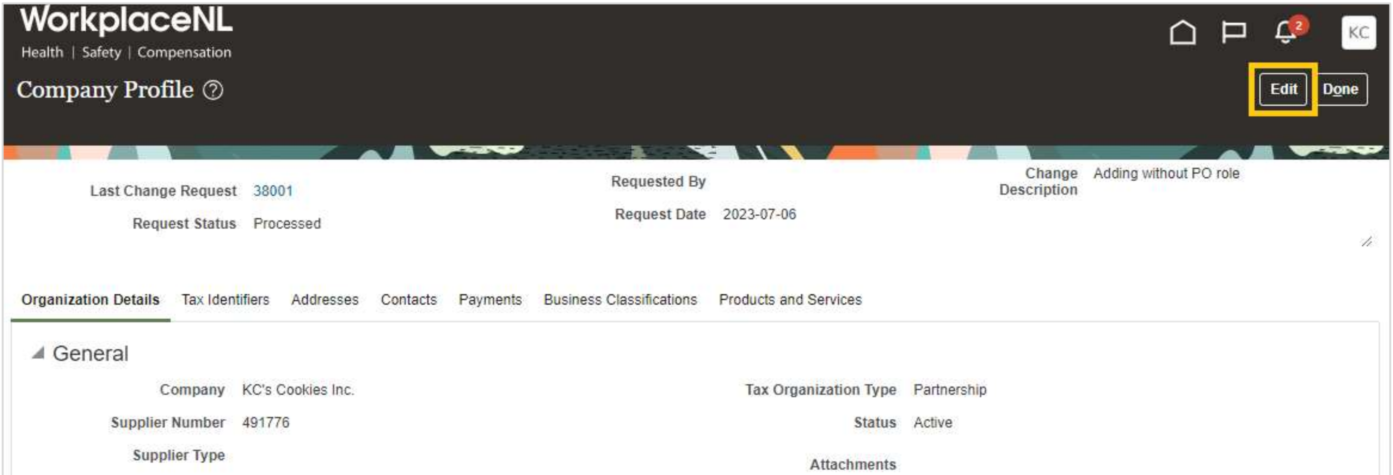




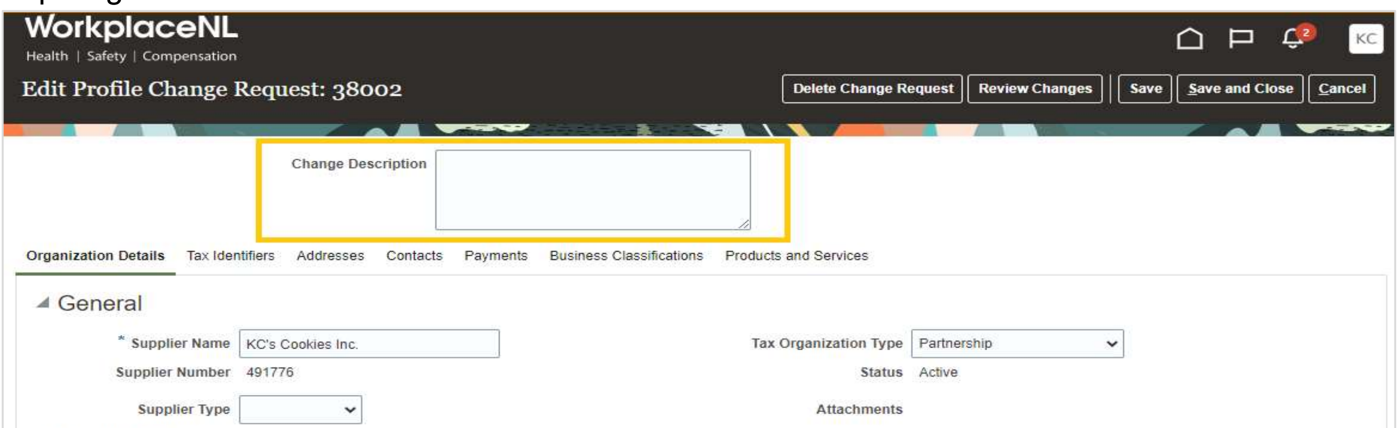
To manage your company details, select **Manage Profile** from the left-hand **Task** menu**.** This option is only available to users/contacts with the WPNL Supplier Admin role.



Select **Edit**.

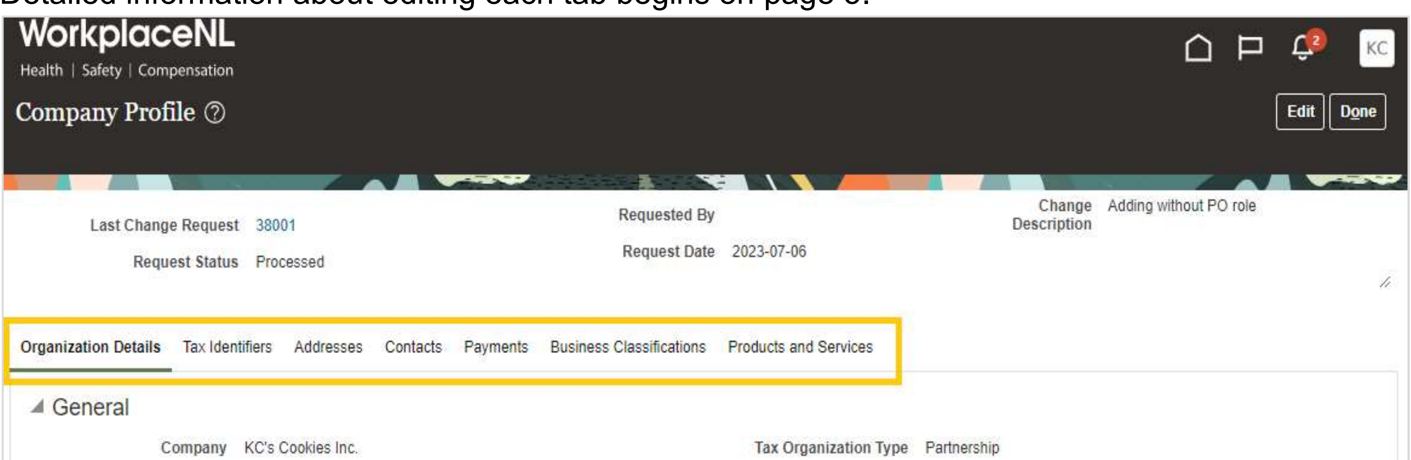


Enter a **Change Description** note indicating the information you are updating, then select the tab requiring edits.

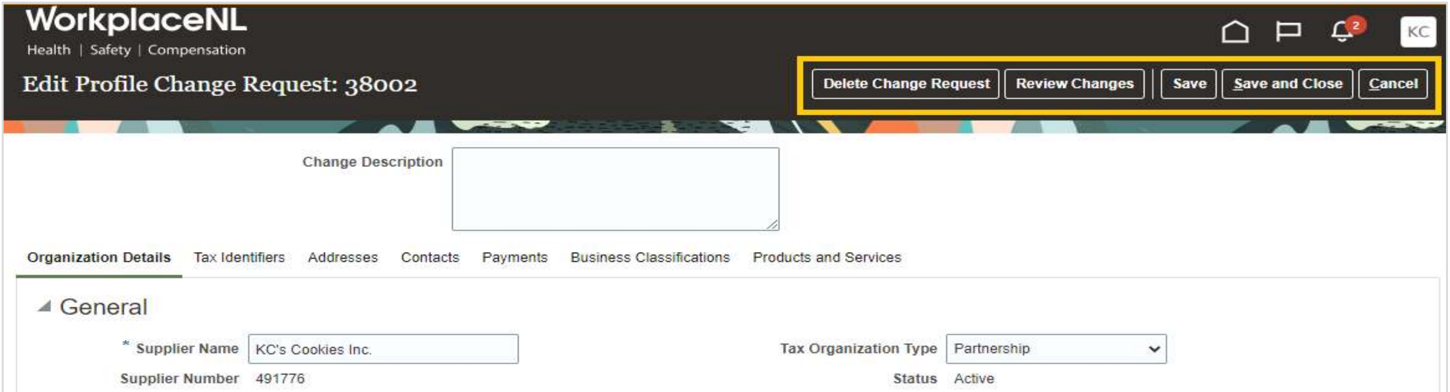


Only **Organization Details, Addresses, Contacts, Payments**, and **Products and Services** can be updated; **Tax Identifiers** and **Business Classifications** cannot be updated.

Detailed information about editing each tab begins on page 5.

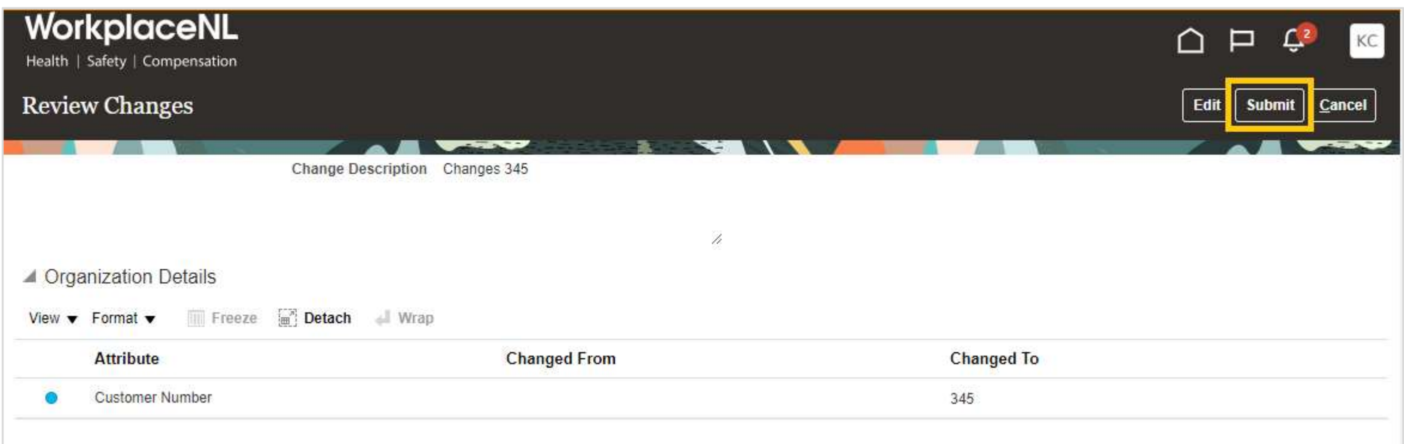


Multiple edits can be made by switching between tabs in the ribbon bar. When all changes are complete on the required tabs, select **Save**, then **Review Changes**.



After reviewing changes made, select **Submit**.

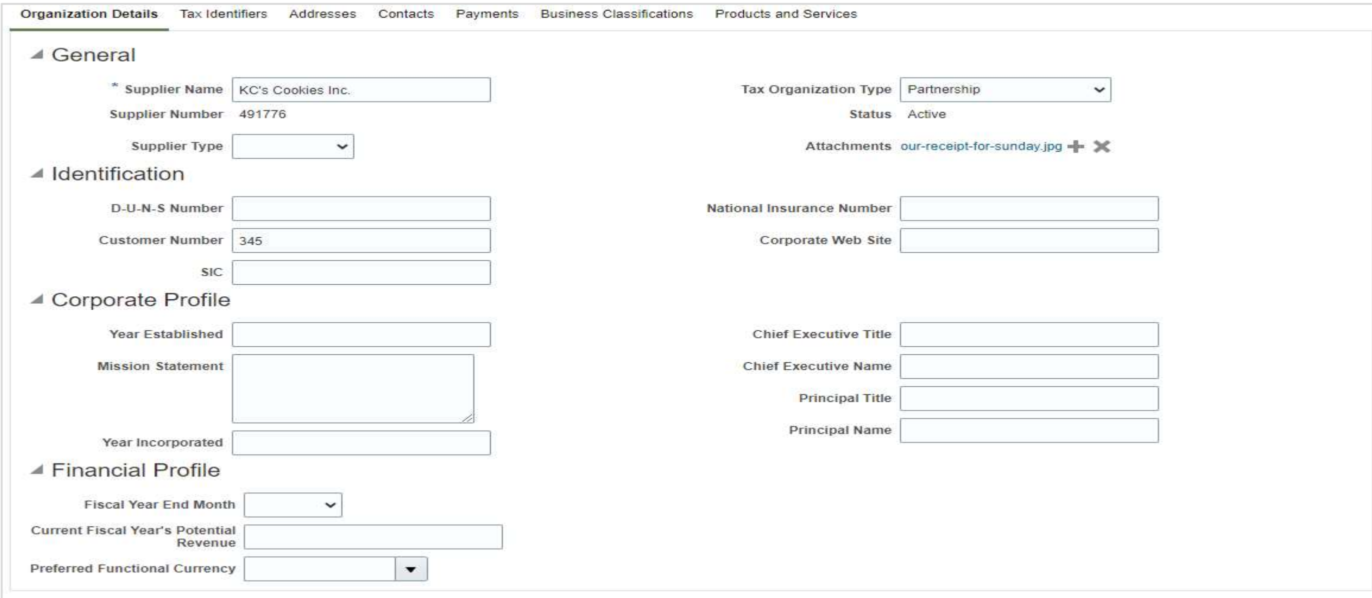
Once WorkplaceNL has reviewed your submitted changes and approved them, the changes will be reflected on your profile.



Editing Profile Tabs

Editing Organization Details

Select the **Organizational Details** tab in the ribbon bar. Update Organizational Details as required.



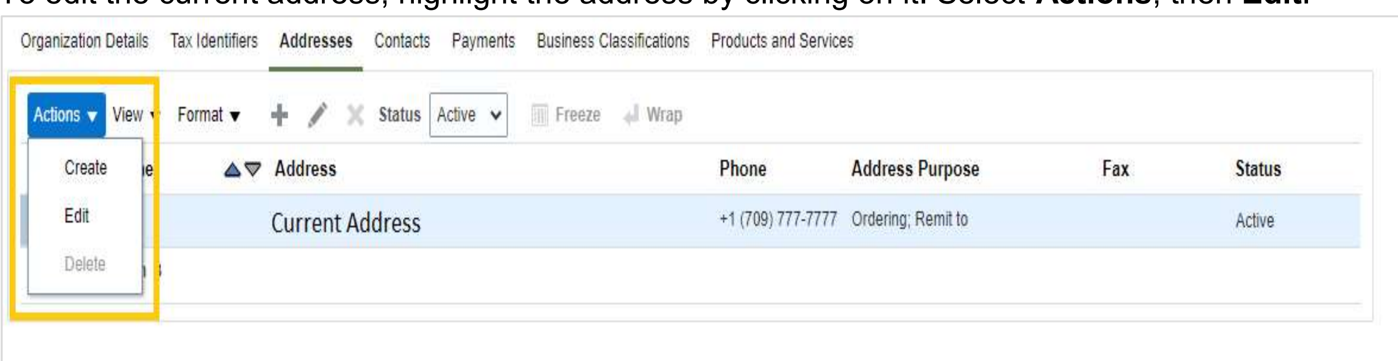
Once complete, select **Review Changes** and then select **Submit**. See page 4 for additional details.

Editing Address

Select the **Address** tab in the ribbon bar.

Only one address is allowed on a Company Profile for WorkplaceNL purposes. You cannot add an additional address, you must edit the current address. **Note**: Ensure there is a phone number associated with the current address.

To edit the current address, highlight the address by clicking on it. Select **Actions**, then **Edit**.



Once complete, select **Review Changes** and then select **Submit**. See page 4 for additional details.

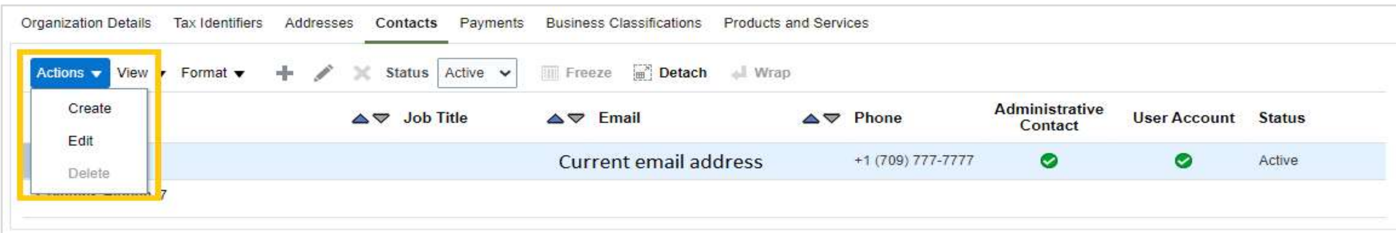
Creating or Editing Contacts

Select the **Contacts** tab in the ribbon bar.

Each user within your business is considered a Contact in Oracle.

To create a new contact, select **Actions**, then **Create**.

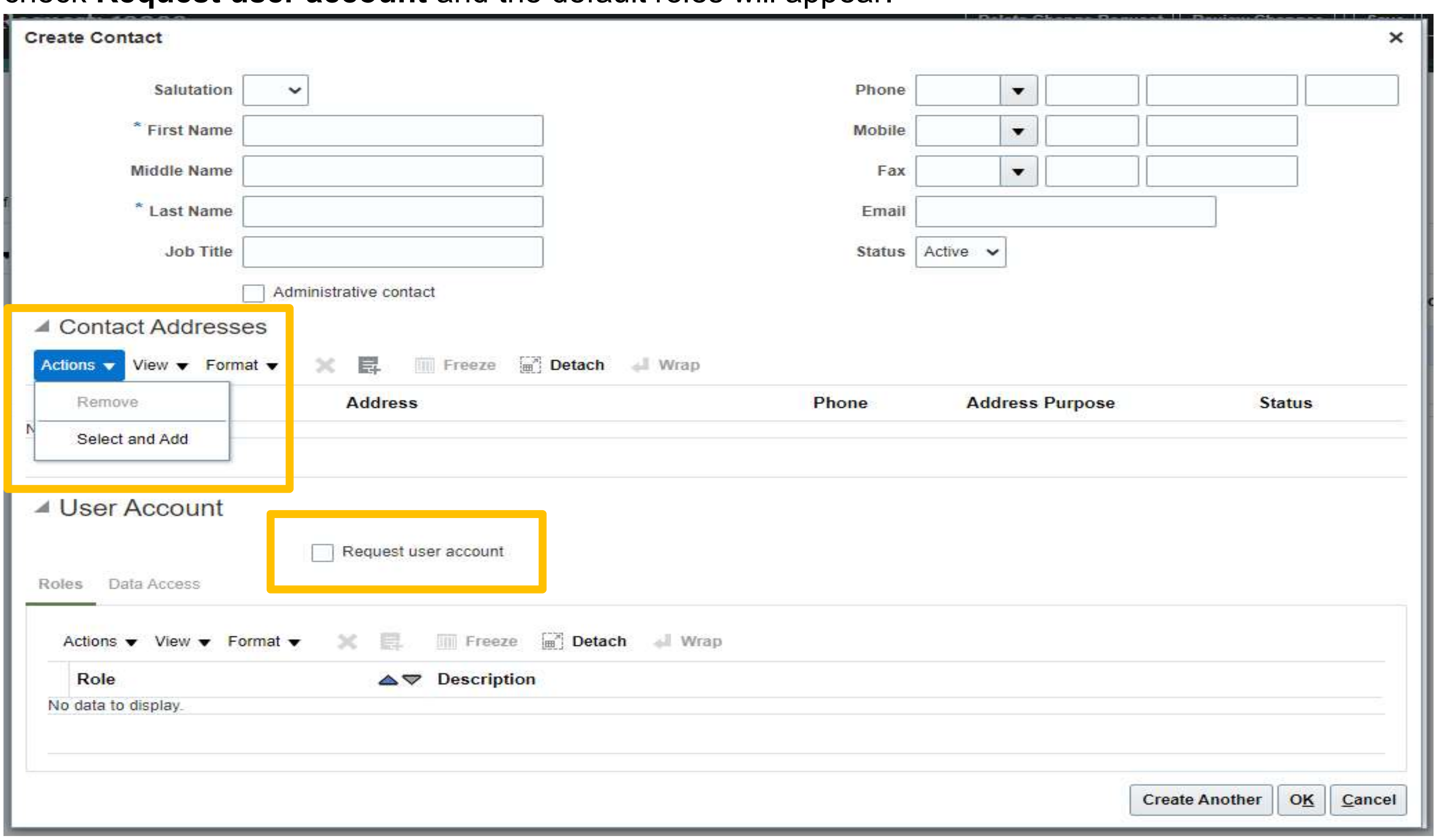
To edit an existing contact, highlight the contact by clicking on it. Select **Actions**, then **Edit**.



On the **Create Contact** screen, enter all contact information. An email address is also required although it is not indicated as mandatory.

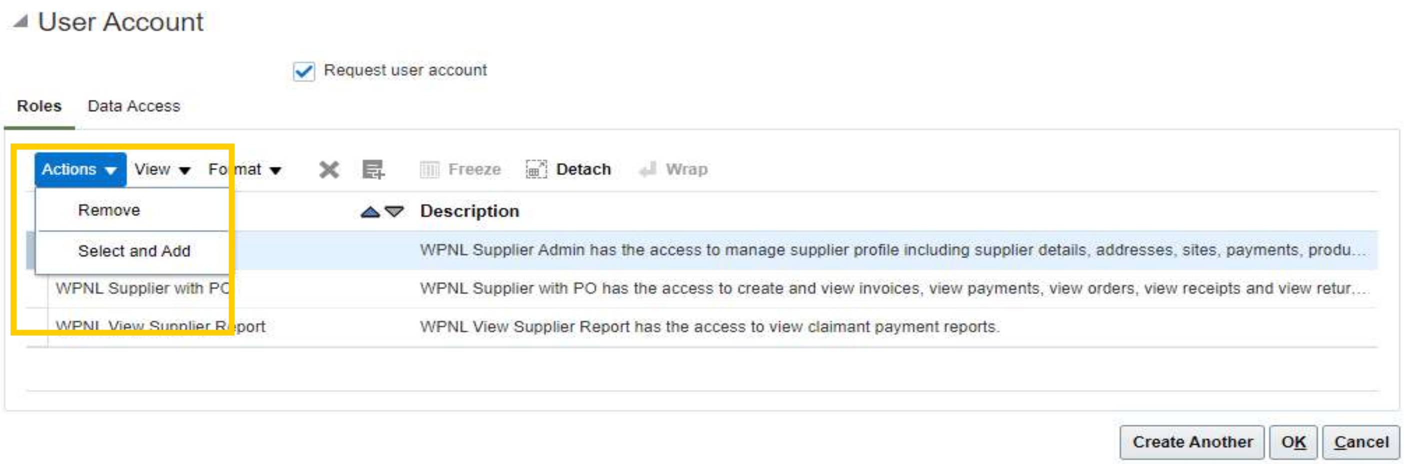
Once the contact information is entered, the contact must be linked to the business address. In the **Contact Addresses** section, select **Actions**, then **Select and Add**.

All contacts must be assigned a role(s) to provide system access. In the **User Account** section, check **Request user account** and the default roles will appear.

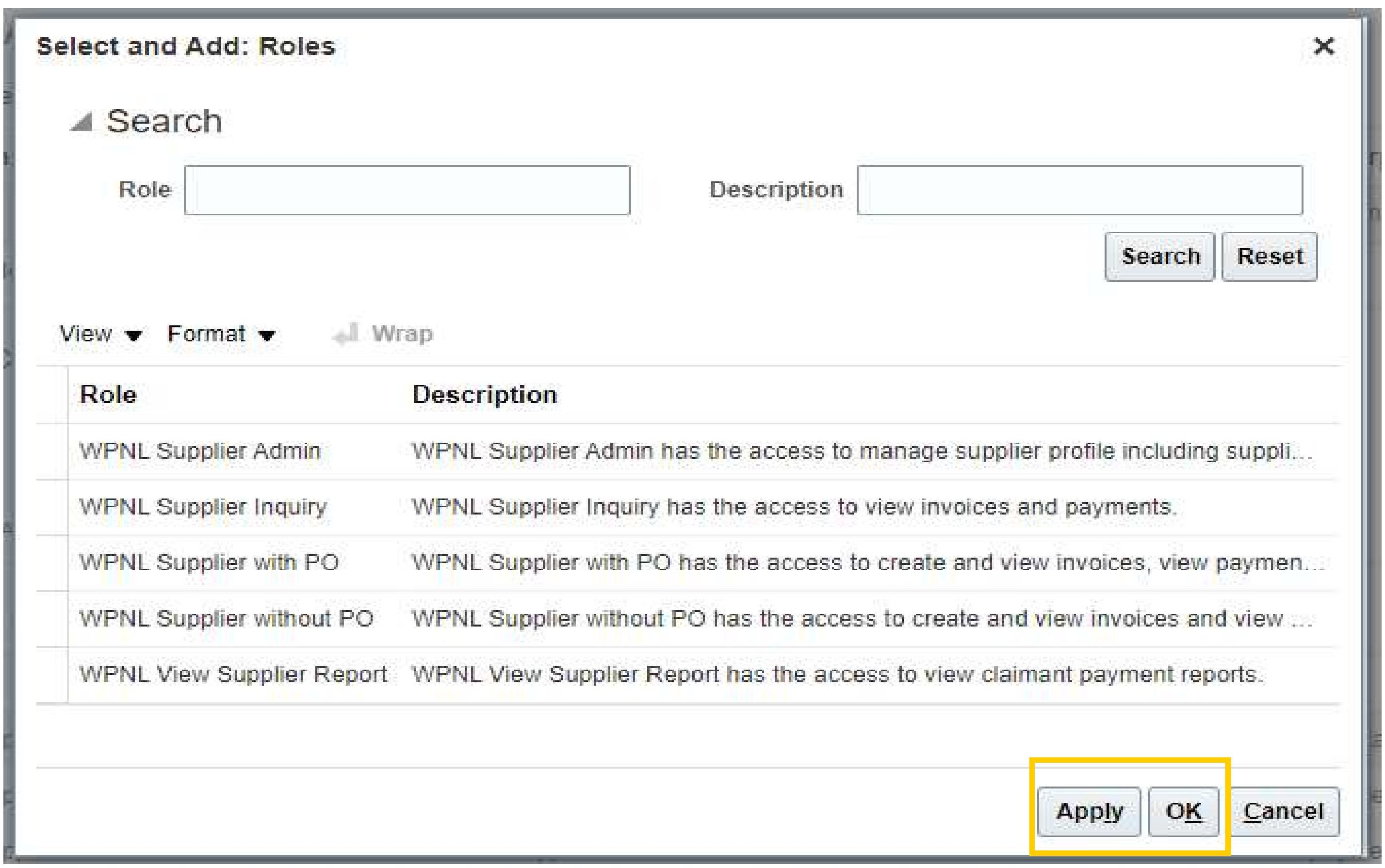


WorkplaceNL

To remove a default role, highlight the role by clicking on it. Select **Actions**, then **Remove**.
To add a different role, select **Actions**, then **Select and Add**.



In the **Select and Add** pop-up box, highlight the access role to be added to the contact by clicking on it, select **Apply**, then **OK**. See additional information on page 8 on selecting access roles.



Once complete, select **Review Changes** and then select **Submit**. See page 4 for additional details.

Selecting Access Roles

The role(s) selected for users should reflect their duties within your business. Some users may be assigned all available roles whereas some users may have limited roles.

User Access	Oracle Supplier Portal Role Names				
	WPNL Supplier Admin	WPNL Supplier With PO	WPNL Supplier Without PO	WPNL Supplier Inquiry	WPNL View Supplier Report
Manage Orders		X			
Create Invoices		X	X		
View Invoices		X	X	X	
View Payments		X	X	X	
View Supplier Payments Report					X
Manage Company Profile	X				

Manage Orders: required for businesses that provide goods and services through issued purchase orders.
Create Invoices: allows a user to create and submit invoices.
View Invoices: allows a user to view invoices only.
View Payments and **View Supplier Payments Report:** both roles must be assigned together to allow the user to view both summary and detailed payment information.
Manage Company Profile: allows a user to modify business information, such as banking information, adding or inactivating contacts (users), and editing your address.

Users with different roles will have different options on their left-hand Task menu, for example:

All roles assigned:

Tasks

Orders

- Manage Orders
- Manage Schedules
- Acknowledge Schedules in Spreadsheet

Shipments

- View Receipts
- View Returns

Invoices and Payments

- Create Invoice
- Create Invoice Without PO
- View Invoices
- View Payments

Company Profile

- Manage Profile

Only Supplier Inquiry role assigned:

Tasks

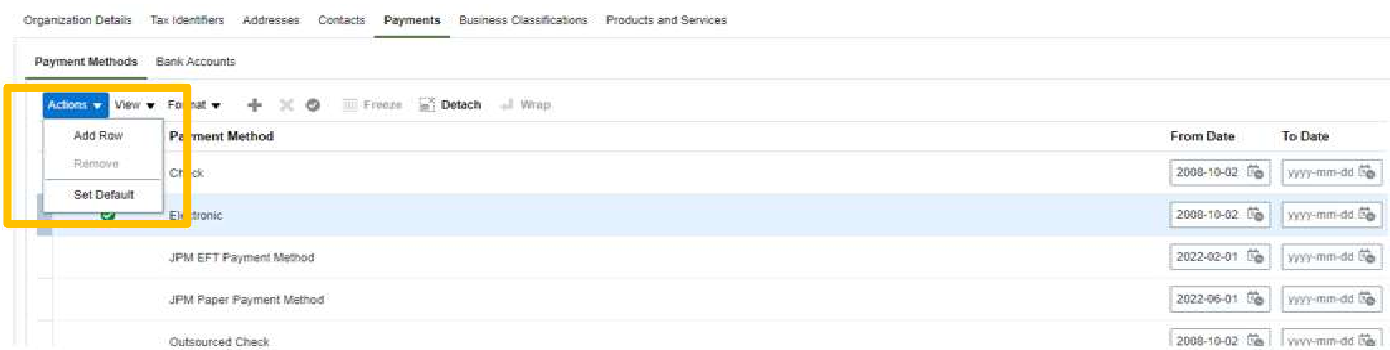
Invoices and Payments

- View Invoices
- View Payments

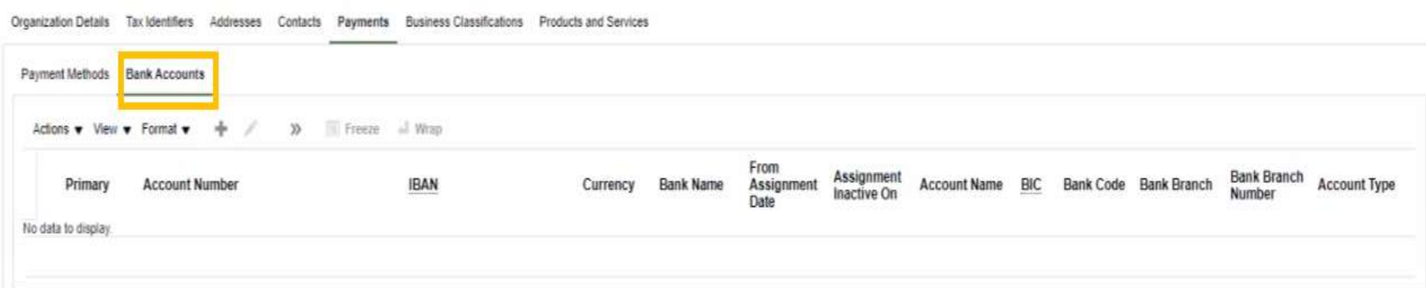
Editing Payments and Banking Information

Select the **Payments** tab in the ribbon bar.

To change your preferred payment method, select the **Payment Methods** tab then highlight the current method by clicking on it. Select **Actions,** then **Set Default**.



To change or add a new bank account, select the **Banking Accounts** tab.

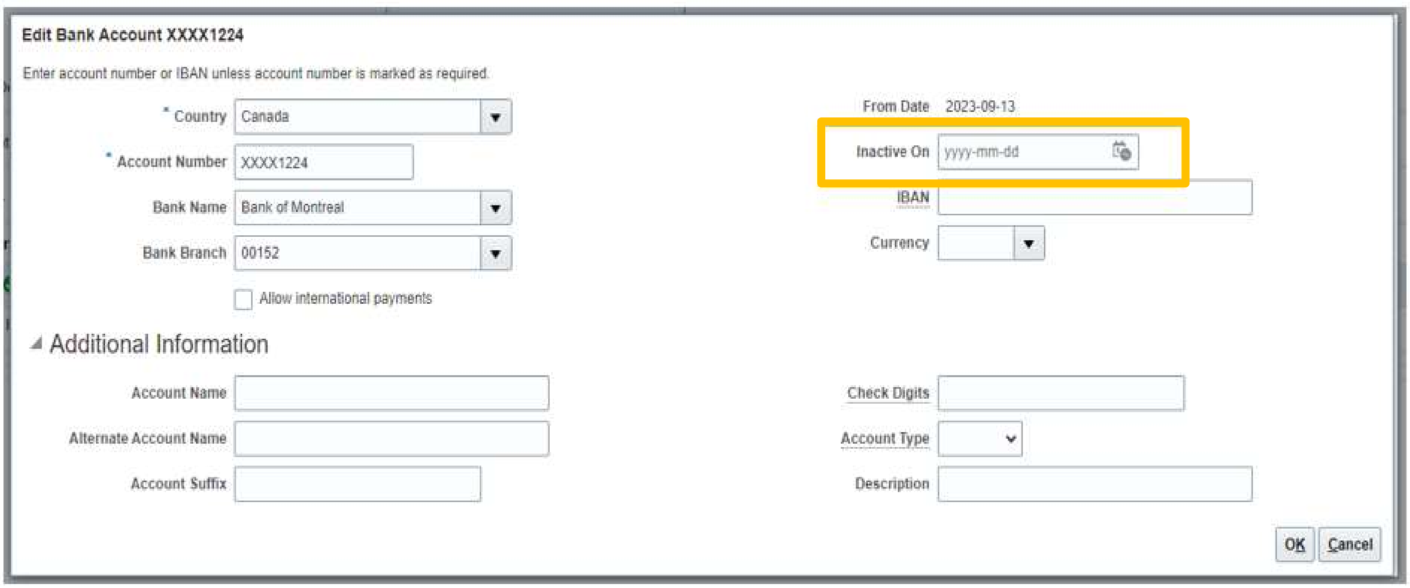


To change the banking information currently active on your profile, you must first inactivate the current account and then create a new one. You must then set the new account as your primary account and attach banking information. You are then ready to submit.

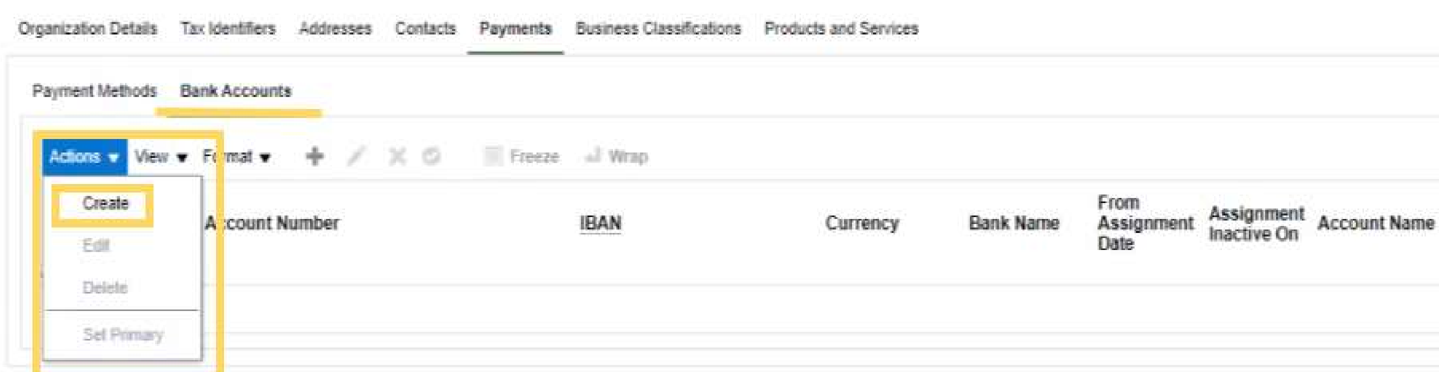
> **Note:**
>
> You must inactivate the old bank account first before creating a new one. If you edit the existing bank account, all payment history related to that bank account will be lost.

To inactivate a bank account, from the **Bank Accounts** tab, select **Actions**, then **Edit**.

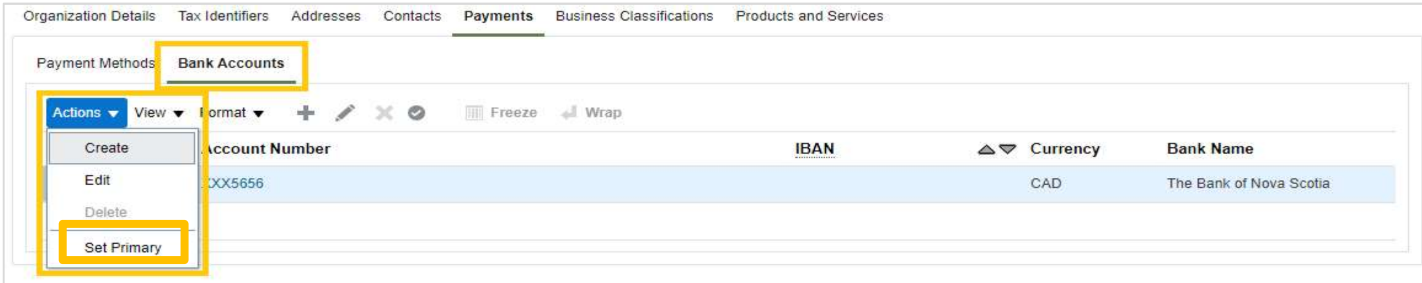
Enter an **Inactive On** date and select **OK**.



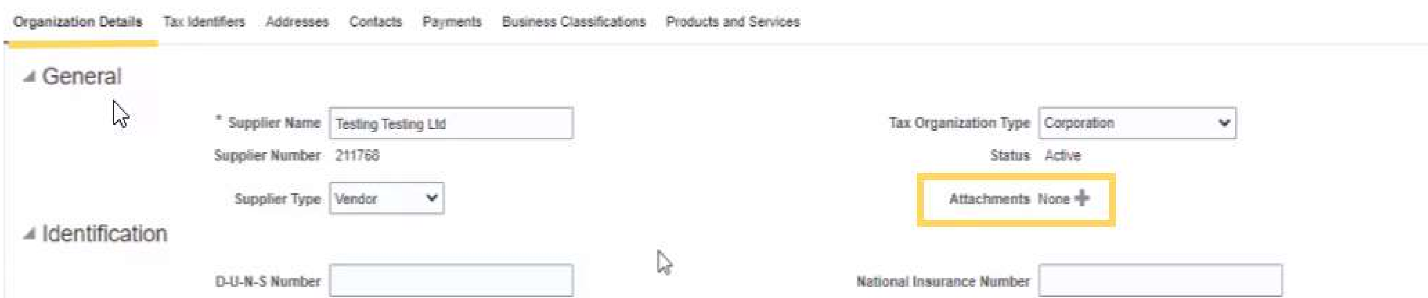
To create a new bank account, from the **Bank Accounts** tab, select **Actions**, then **Create**.



To designate the bank account as your primary account, from the **Bank Accounts** tab, highlight the account by clicking on it. Select **Actions**, then **Set Primary.**



To attach banking information, select the **Organization Details** tab and select the **Attachments** plus icon + to upload your banking information. This is a requirement for approval of your change.



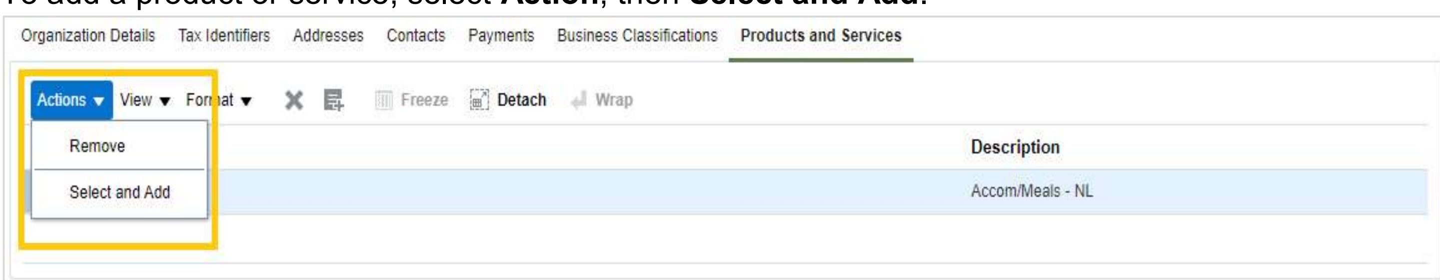
Once complete, select **Review Changes** and then select **Submit**. See page 4 for additional details.

Editing Products and Services

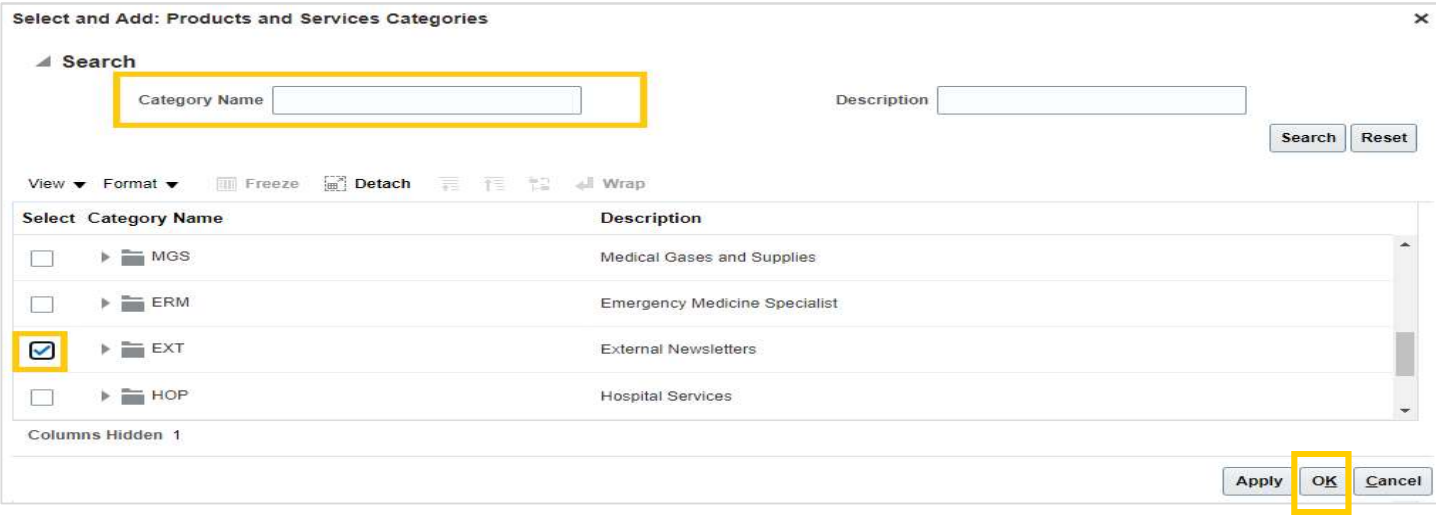
Select the **Products and Services** tab in the ribbon bar.

To remove a current product or service, highlight the product or service by clicking on it. Select **Action**, then **Remove**.

To add a product or service, select **Action**, then **Select and Add**.



On the **Select and Add** pop-up box, search by **Category Name** or select from the list by checking the box beside the category. Then select **OK**.



Once complete, select **Review Changes** and then select **Submit**. See page 4 for additional details.