

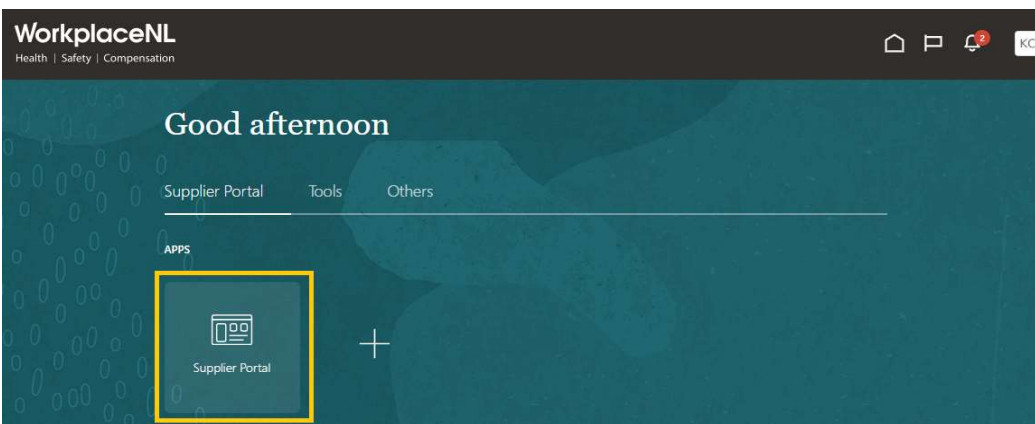
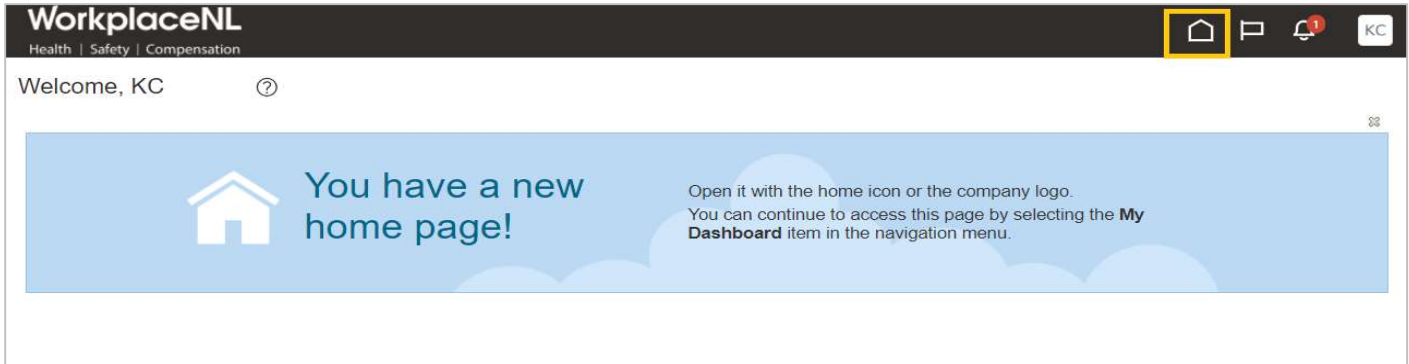
# Managing Your Company Profile

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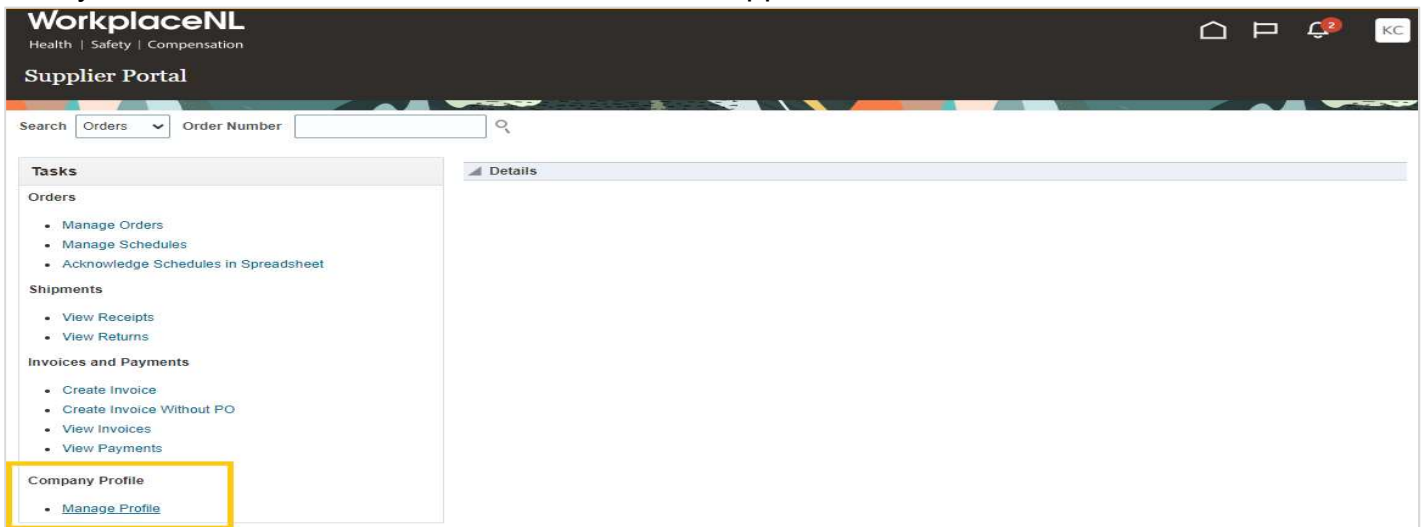
## Managing Your Company Profile

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.

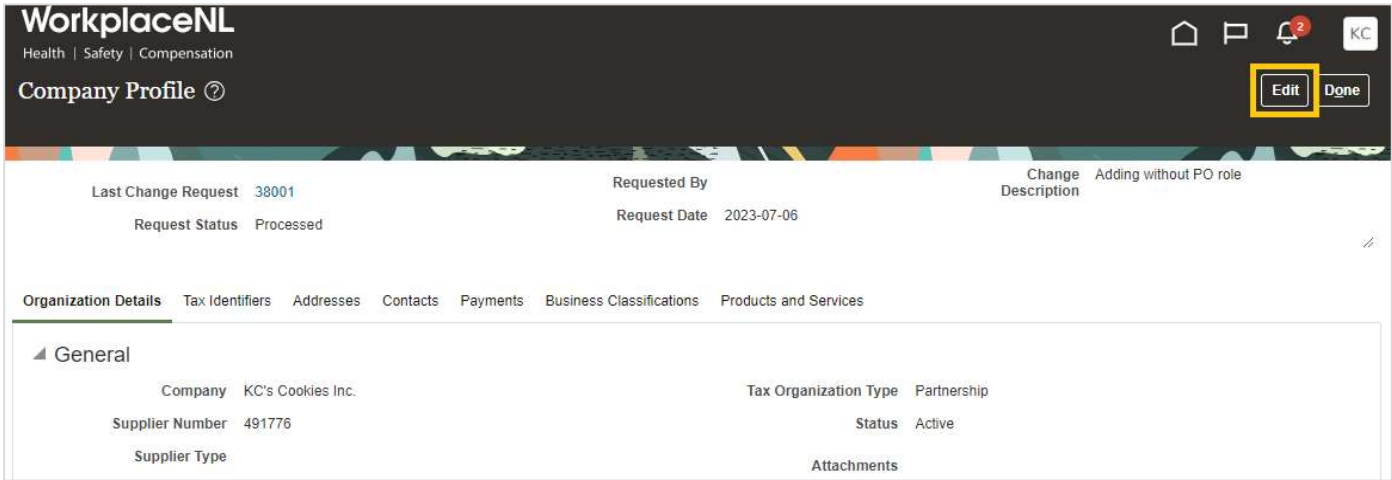
After you log in, select the home icon and then **Supplier Portal**.



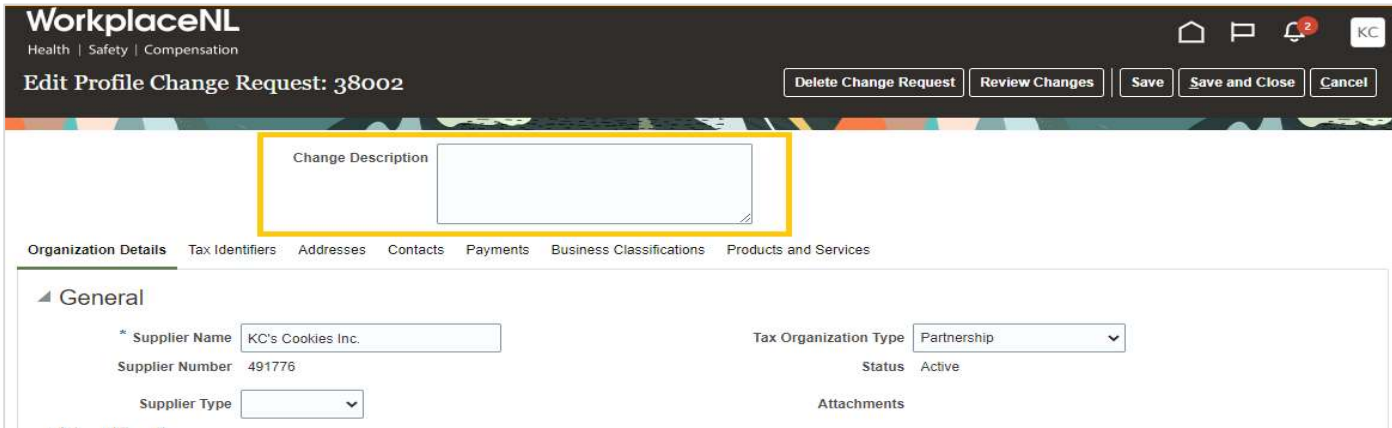
To manage your company details, select **Manage Profile** from the left-hand **Task** menu. This option is only available to users/contacts with the WPNL Supplier Admin role.



Select **Edit**.

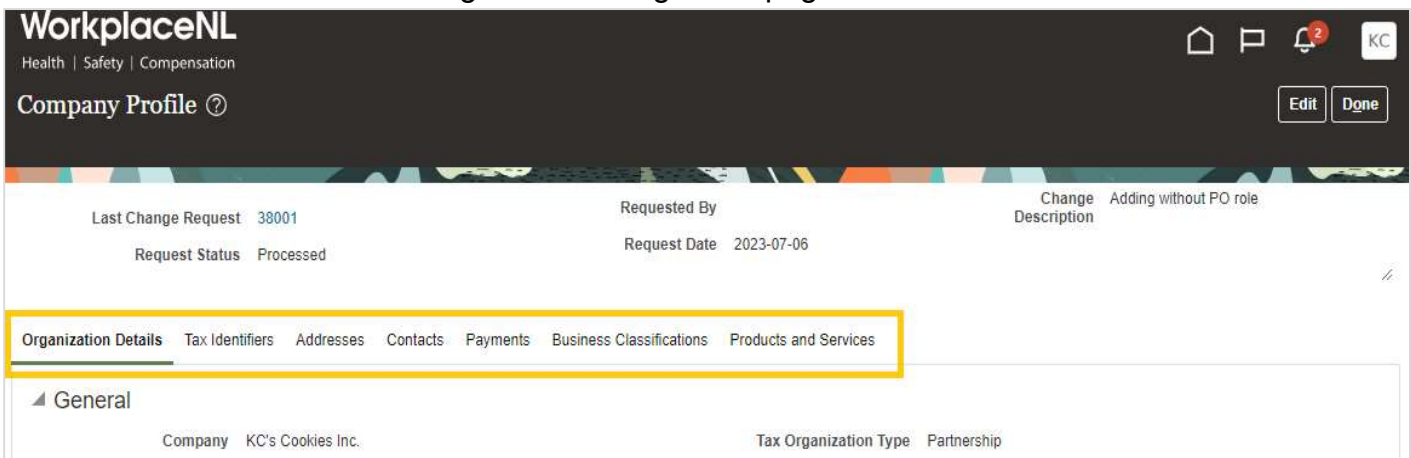


Enter a **Change Description** note indicating the information you are updating, then select the tab requiring edits.

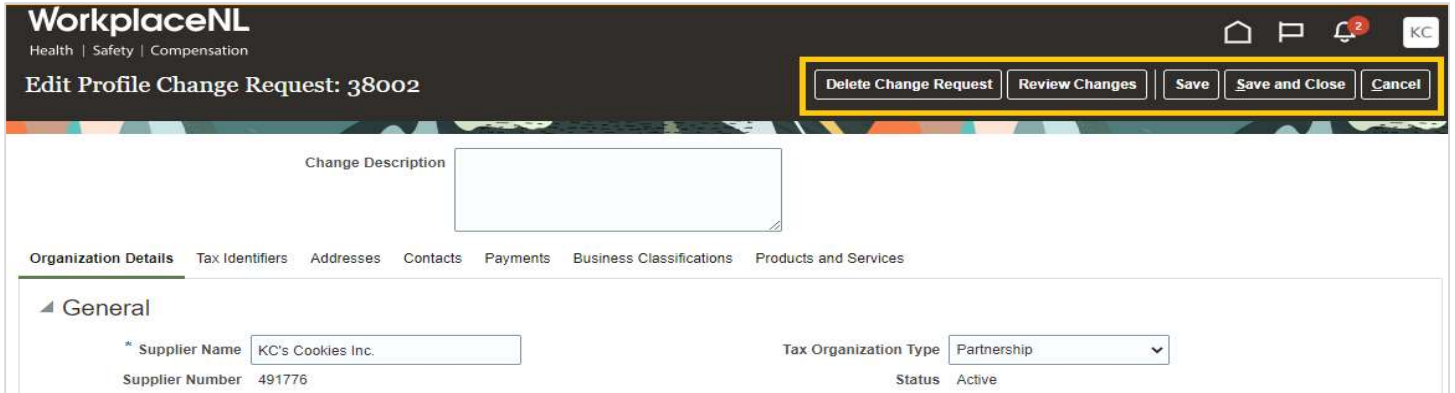


Only **Organization Details**, **Addresses**, **Contacts**, **Payments**, and **Products and Services** can be updated; **Tax Identifiers** and **Business Classifications** cannot be updated.

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**.



WorkplaceNL  
Health | Safety | Compensation

Edit Profile Change Request: 38002

Change Description

Organization Details Tax Identifiers Addresses Contacts Payments Business Classifications Products and Services

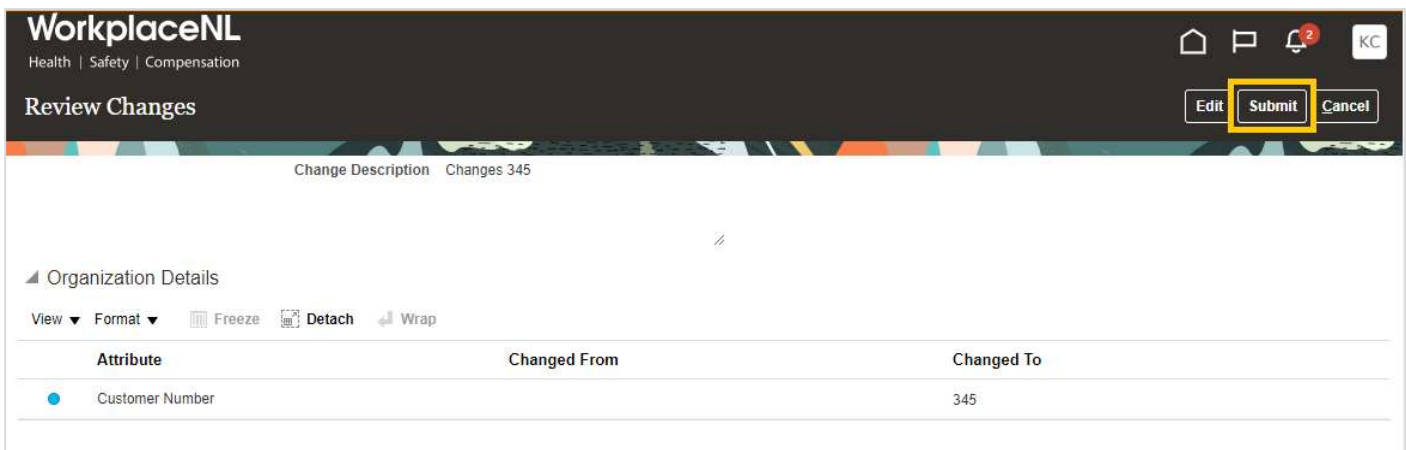
General

\* Supplier Name KC's Cookies Inc. Tax Organization Type Partnership

Supplier Number 491776 Status Active

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

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



WorkplaceNL  
Health | Safety | Compensation

Review Changes

Change Description Changes 345

Organization Details

View Format Freeze Detach Wrap

Attribute	Changed From	Changed To
Customer Number		345

## Editing Profile Tabs

### Editing Organization Details

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

Organization Details Tax Identifiers Addresses Contacts Payments Business Classifications Products and Services

General

Supplier Name KC's Cookies Inc.

Supplier Number 491776

Supplier Type

Tax Organization Type Partnership

Status Active

Attachments our-receipt-for-sunday.jpg + X

Identification

D-U-N-S Number

Customer Number 345

SIC

Corporate Profile

Year Established

Mission Statement

Year Incorporated

Chief Executive Title

Chief Executive Name

Principal Title

Principal Name

Financial Profile

Fiscal Year End Month

Current Fiscal Year's Potential Revenue

Preferred Functional Currency

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**.

Organization Details Tax Identifiers Addresses Contacts Payments Business Classifications Products and Services

Actions View

Format + X Status Active Freeze Wrap

Address	Phone	Address Purpose	Fax	Status
Current Address	+1 (709) 777-7777	Ordering; Remit to		Active

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

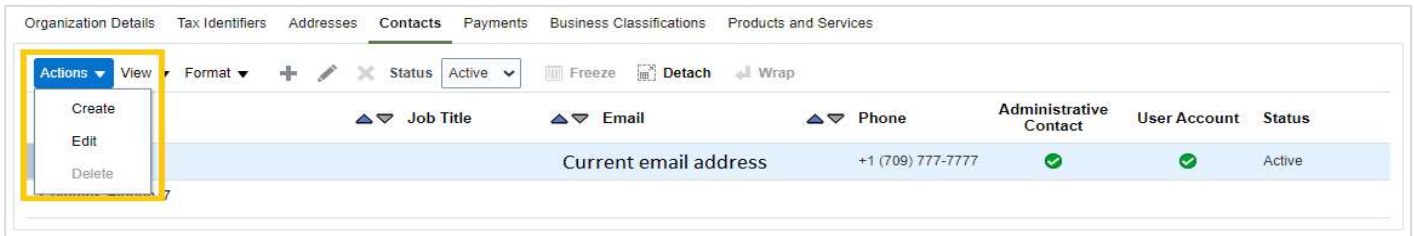
## Creating or Editing Contacts

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**.

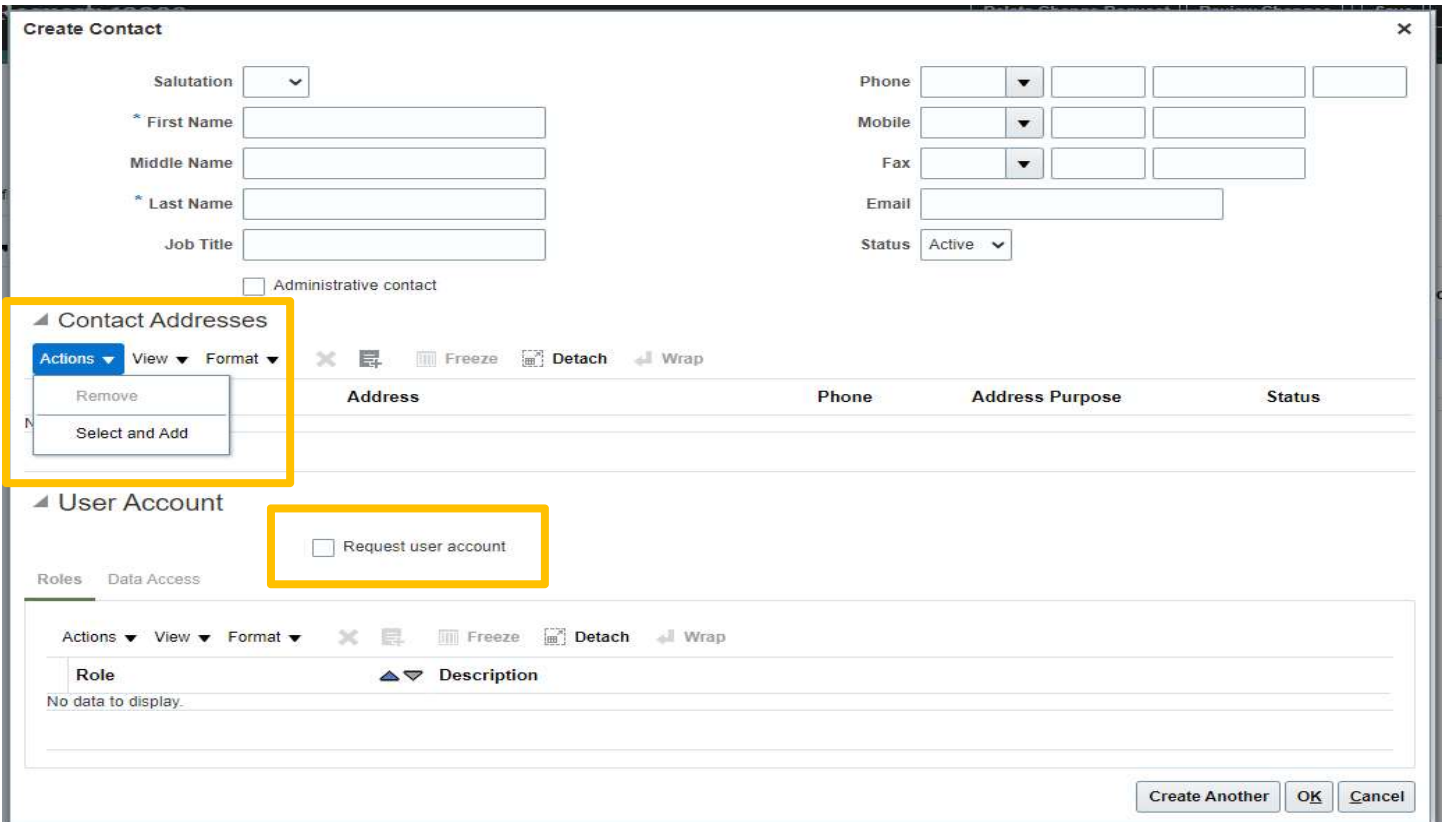
To edit an existing contact, highlight the contact by clicking on it. Select **Actions**, then **Edit**.



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.

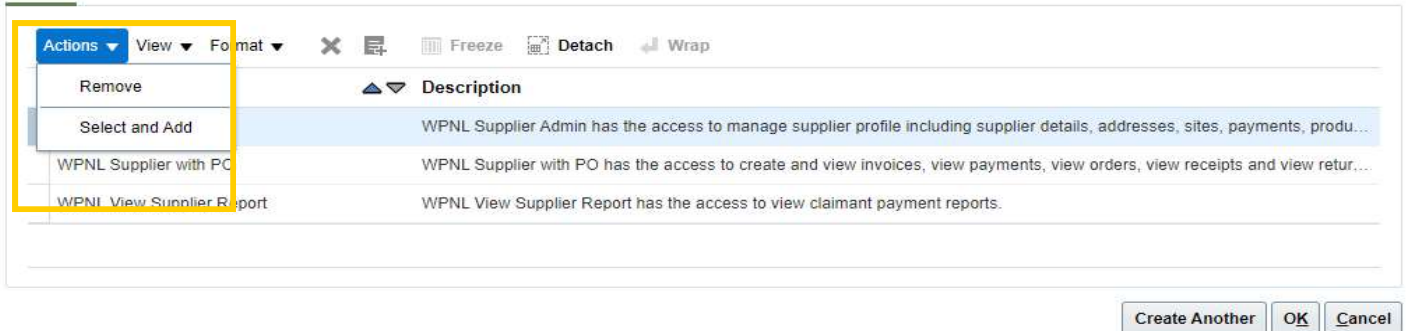


To remove a default role, highlight the role by clicking on it. Select **Actions**, then **Remove**.  
To add a different role, select **Actions**, then **Select and Add**.

#### User Account

Request user account

Roles Data Access

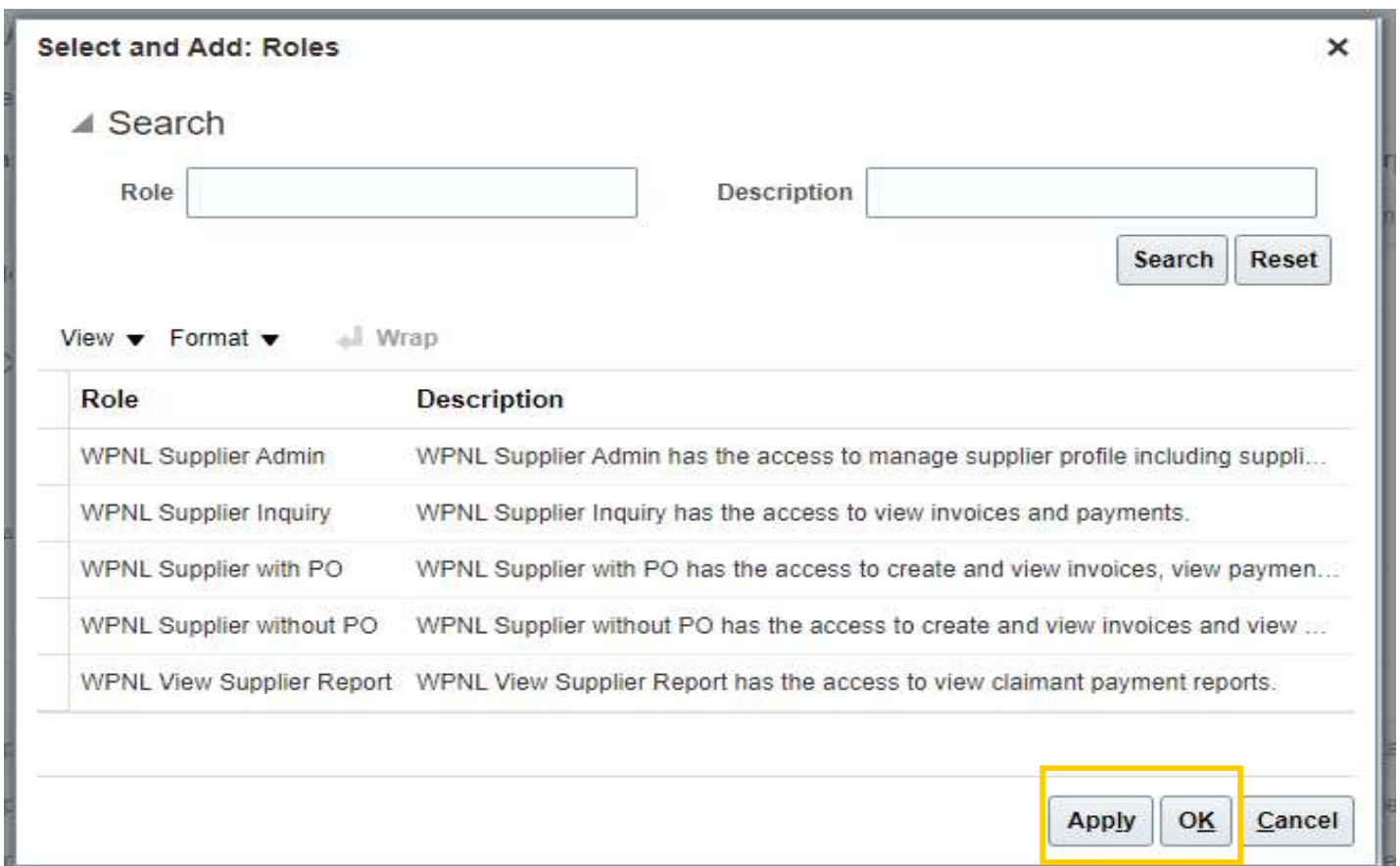


The screenshot shows a table with columns for Role and Description. The 'Actions' menu is open, highlighting 'Remove' and 'Select and Add'. The table contains the following data:

Role	Description
WPNL Supplier Admin	WPNL Supplier Admin has the access to manage supplier profile including supplier details, addresses, sites, payments, produ...
WPNL Supplier with PO	WPNL Supplier with PO has the access to create and view invoices, view payments, view orders, view receipts and view retur...
WPNL View Supplier Report	WPNL View Supplier Report has the access to view claimant payment reports.

Buttons at the bottom right: Create Another, OK, Cancel.

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.



The screenshot shows the 'Select and Add: Roles' pop-up box. It has a search section with 'Role' and 'Description' input fields, and 'Search' and 'Reset' buttons. Below is a table with columns for Role and Description. The 'Apply' and 'OK' buttons are highlighted with a yellow box.

Role	Description
WPNL Supplier Admin	WPNL Supplier Admin has the access to manage supplier profile including suppli...
WPNL Supplier Inquiry	WPNL Supplier Inquiry has the access to view invoices and payments.
WPNL Supplier with PO	WPNL Supplier with PO has the access to create and view invoices, view paymen...
WPNL Supplier without PO	WPNL Supplier without PO has the access to create and view invoices and view ...
WPNL View Supplier Report	WPNL View Supplier Report has the access to view claimant payment reports.

Buttons at the bottom right: Apply, OK, Cancel.

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
<b>Orders</b> <ul style="list-style-type: none"> <li>Manage Orders</li> <li>Manage Schedules</li> <li>Acknowledge Schedules in Spreadsheet</li> </ul>
<b>Shipments</b> <ul style="list-style-type: none"> <li>View Receipts</li> <li>View Returns</li> </ul>
<b>Invoices and Payments</b> <ul style="list-style-type: none"> <li>Create Invoice</li> <li>Create Invoice Without PO</li> <li>View Invoices</li> <li>View Payments</li> </ul>
<b>Company Profile</b> <ul style="list-style-type: none"> <li>Manage Profile</li> </ul>

### Only Supplier Inquiry role assigned:

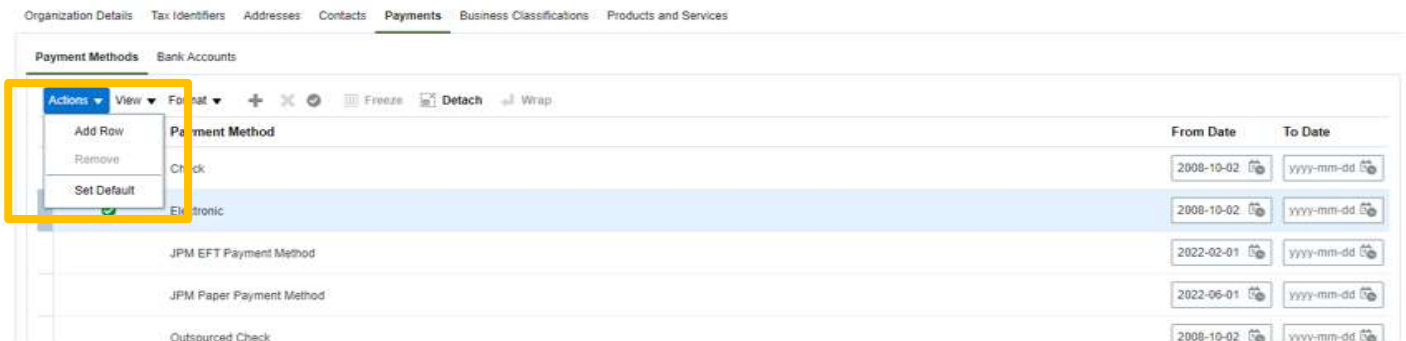
Tasks
<b>Invoices and Payments</b> <ul style="list-style-type: none"> <li>View Invoices</li> <li>View Payments</li> </ul>



## 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**.



Payment Method	From Date	To Date
Check	2008-10-02	yyyy-mm-dd
Electronic	2008-10-02	yyyy-mm-dd
JPM EFT Payment Method	2022-02-01	yyyy-mm-dd
JPM Paper Payment Method	2022-06-01	yyyy-mm-dd
Outsourced Check	2008-10-02	yyyy-mm-dd

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



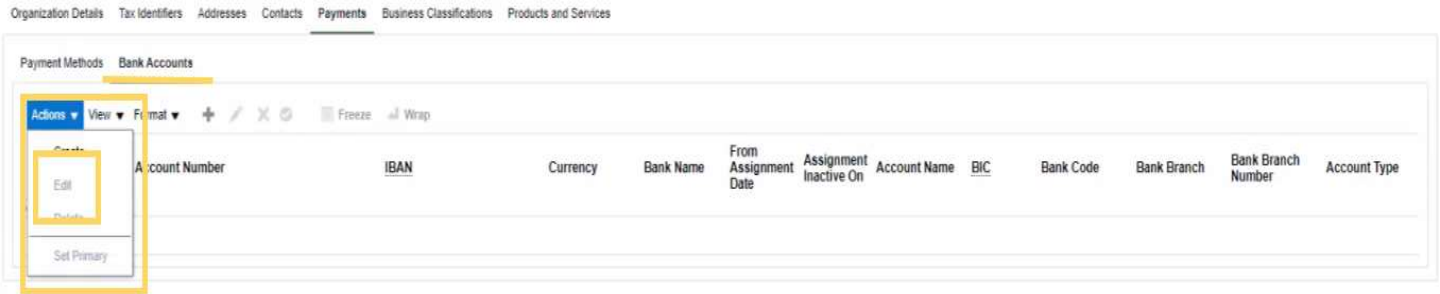
Primary	Account Number	IBAN	Currency	Bank Name	From Assignment Date	Assignment Inactive On	Account Name	BIC	Bank Code	Bank Branch	Bank Branch Number	Account Type
No data to display												

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**.

**Edit Bank Account XXXX1224**

Enter account number or IBAN unless account number is marked as required.

\* Country Canada

\* Account Number XXXX1224

Bank Name Bank of Montreal

Bank Branch 00152

Allow international payments

From Date 2023-09-13

Inactive On yyyy-mm-dd

IBAN

Currency

Additional Information

Account Name

Alternate Account Name

Account Suffix

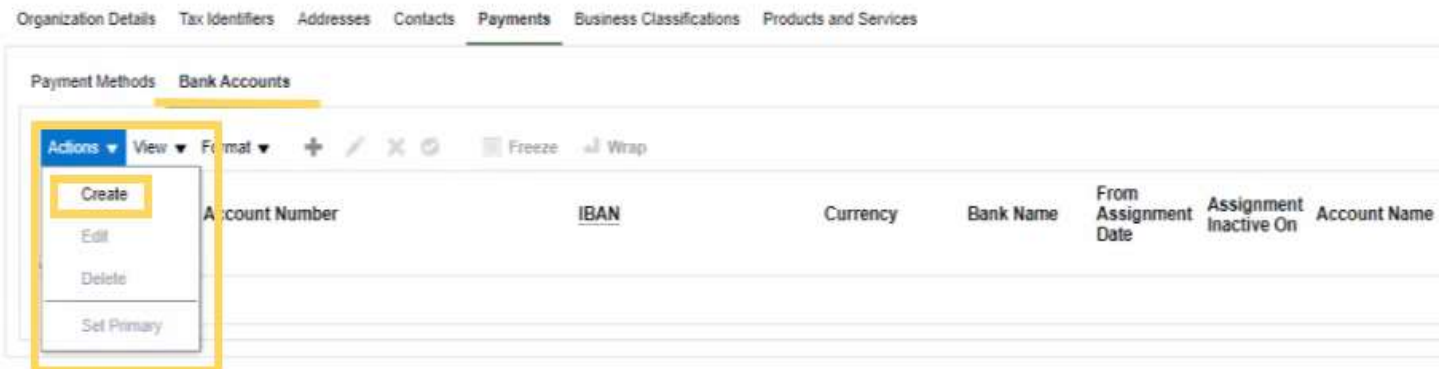
Check Digits

Account Type

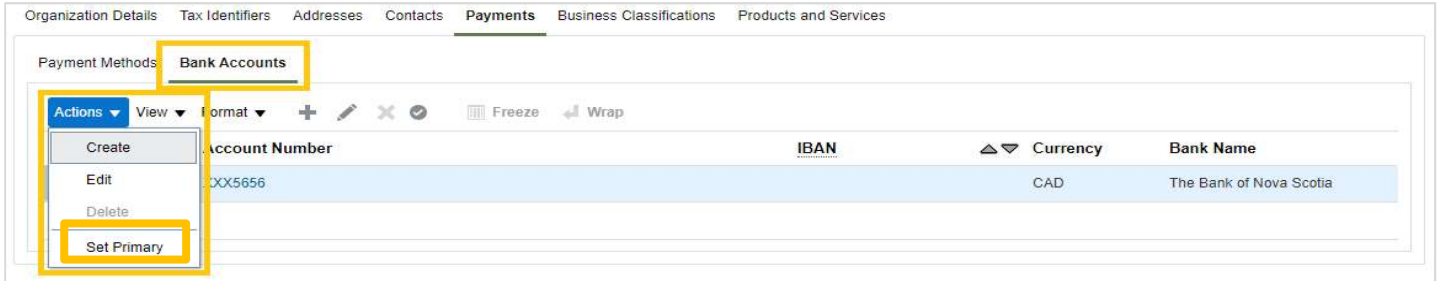
Description

OK Cancel

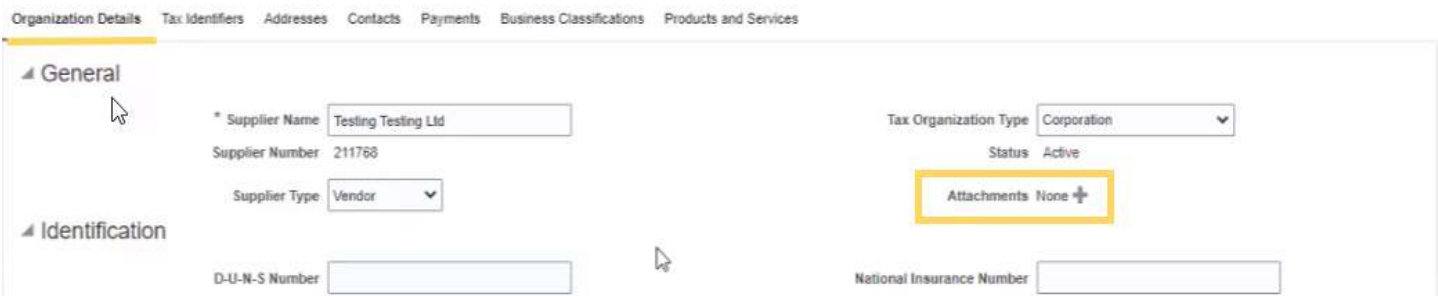
To create a new bank account, from the **Bank Accounts** tab, select **Actions**, then **Create**.



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.



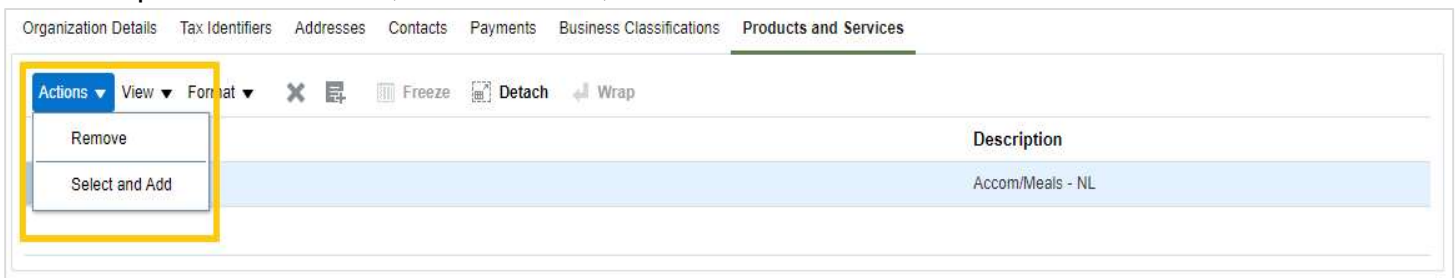
Once complete, select **Review Changes** and then select **Submit**. See page 4 for additional details.

## 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**.

The screenshot shows a dialog box titled "Select and Add: Products and Services Categories". At the top, there is a "Search" section with a "Category Name" input field (highlighted in yellow) and a "Description" input field. To the right of the "Description" field are "Search" and "Reset" buttons. Below the search fields is a toolbar with icons for "View", "Format", "Freeze", "Detach", and "Wrap". The main area is a table with two columns: "Select" and "Category Name" / "Description".

Select	Category Name	Description
<input type="checkbox"/>	▶ MGS	Medical Gases and Supplies
<input type="checkbox"/>	▶ ERM	Emergency Medicine Specialist
<input checked="" type="checkbox"/>	▶ EXT	External Newsletters
<input type="checkbox"/>	▶ HOP	Hospital Services

At the bottom of the dialog, there are "Apply", "OK" (highlighted in yellow), and "Cancel" buttons. The "Columns Hidden" section shows "1".

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