Managing Your Company Profile

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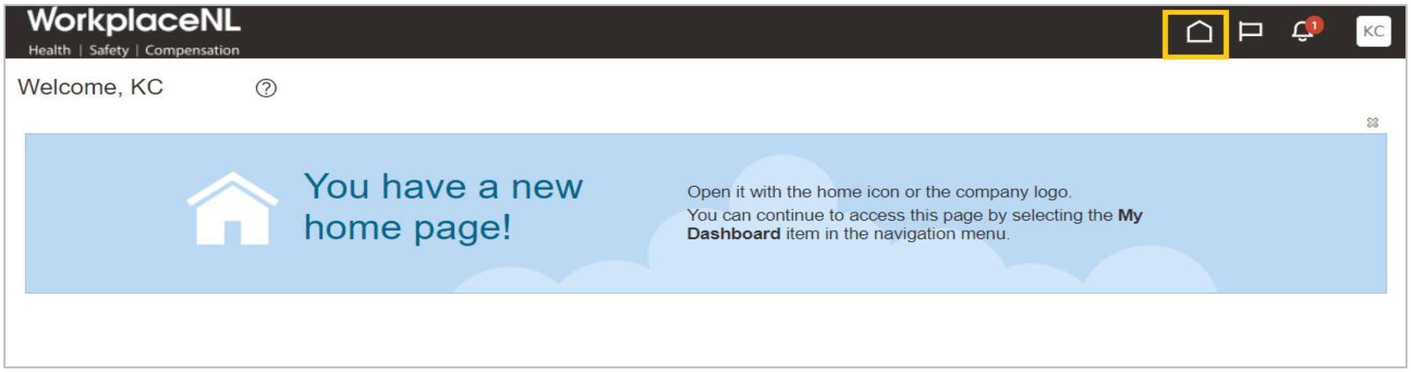
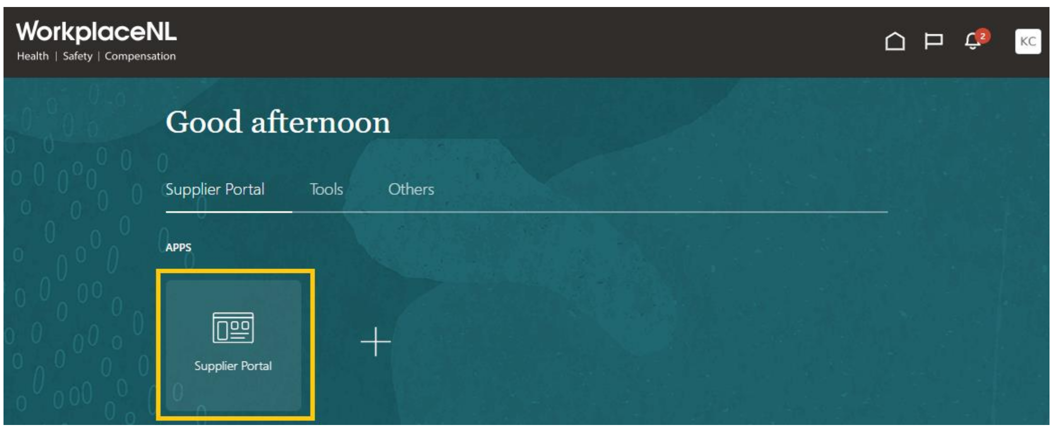
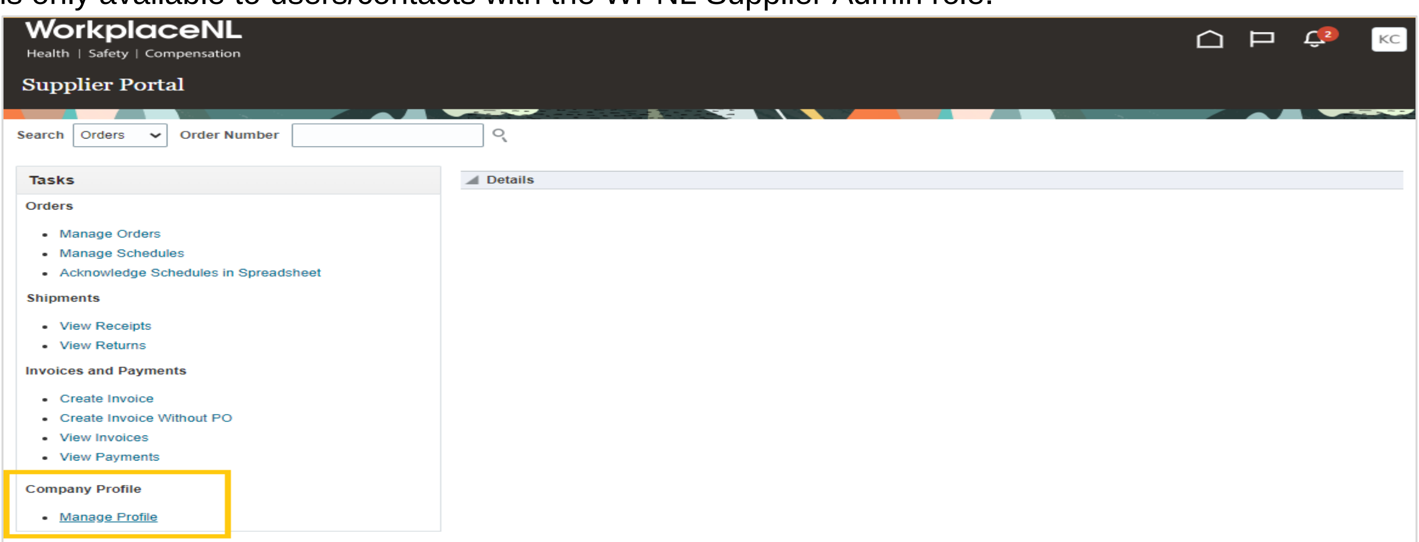
Users with the "WPNL Supplier Admin" role can update and maintain your supplier profile. You will be able to update banking details, create and edit contacts, and edit your address.

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

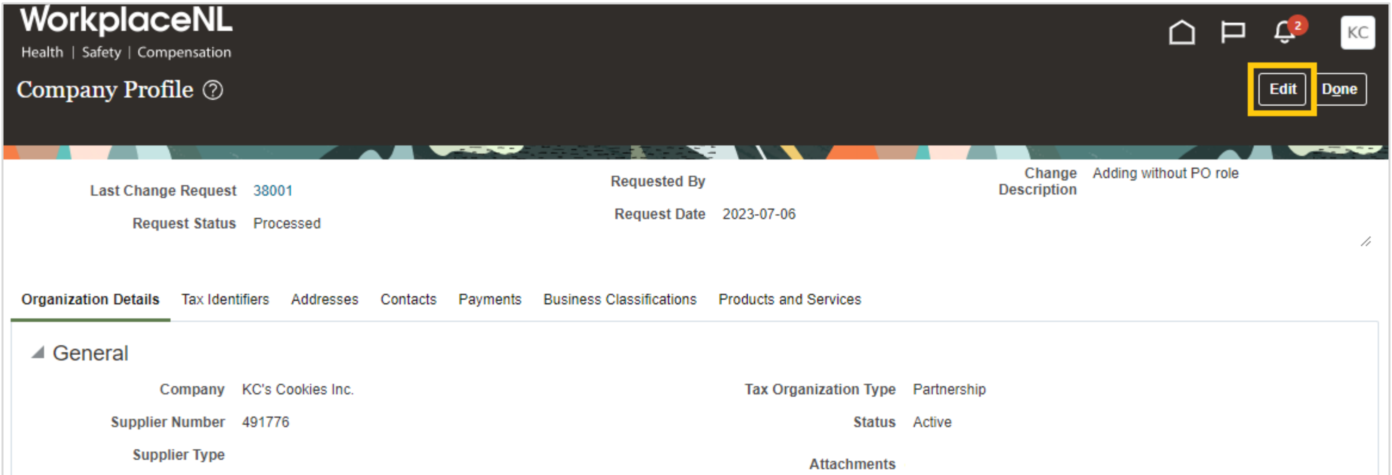




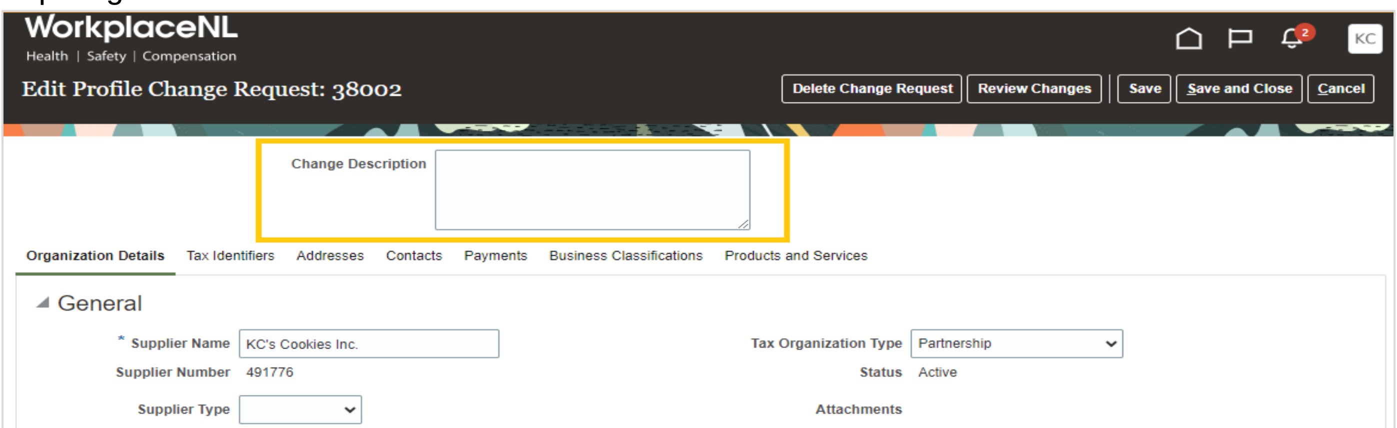
To manage your company details, select **Manage Profile** from the left-hand **Task** menu**.** This option is only available to users/contacts with the WPNL Supplier Admin role.



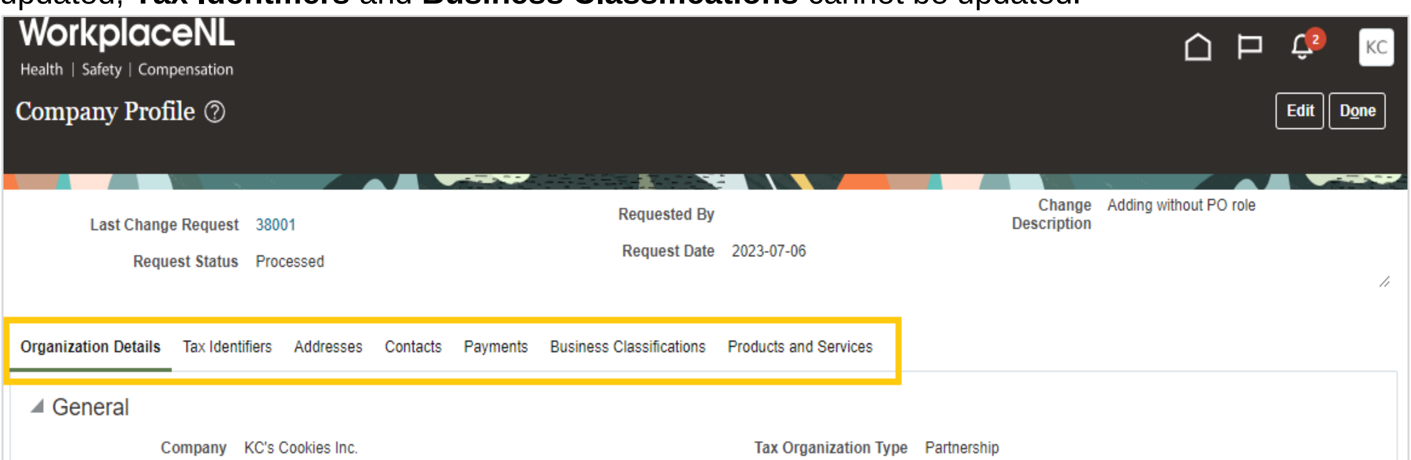
Select **Edit**.



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

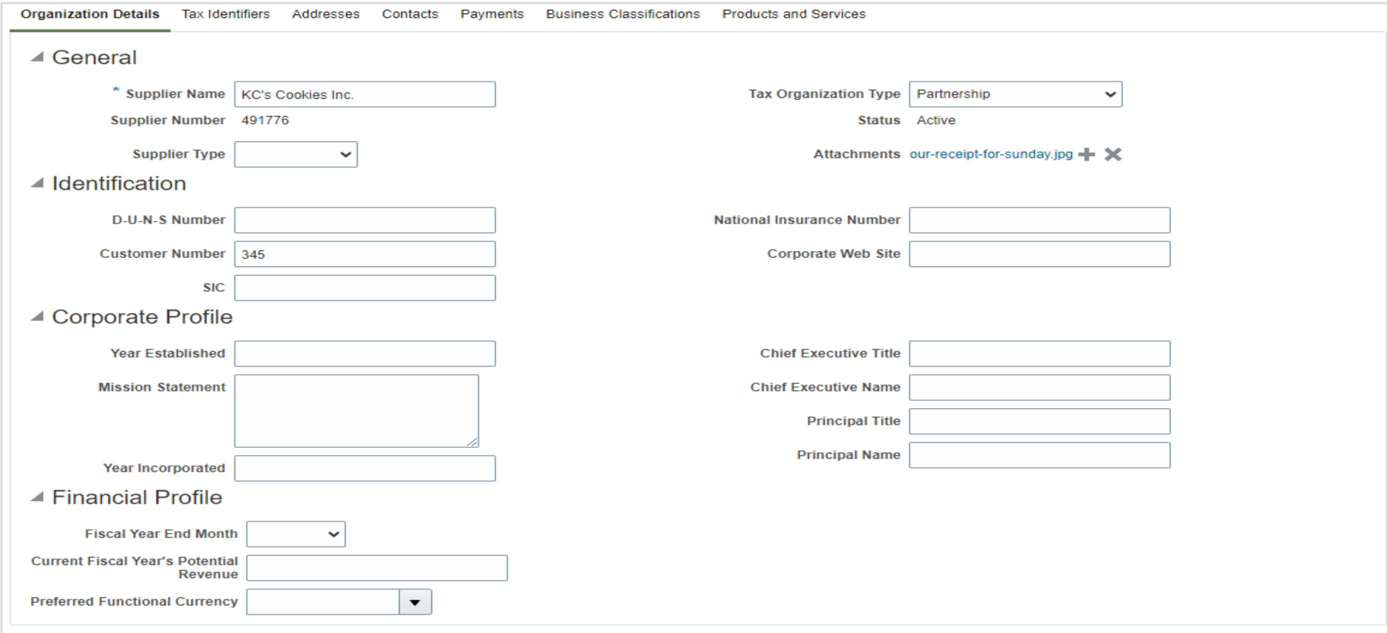


Only **Organization Details, Addresses, Contacts, Payments**, and **Products and Services** can be updated; **Tax Identifiers** and **Business Classifications** cannot be updated.



Editing Organization Details

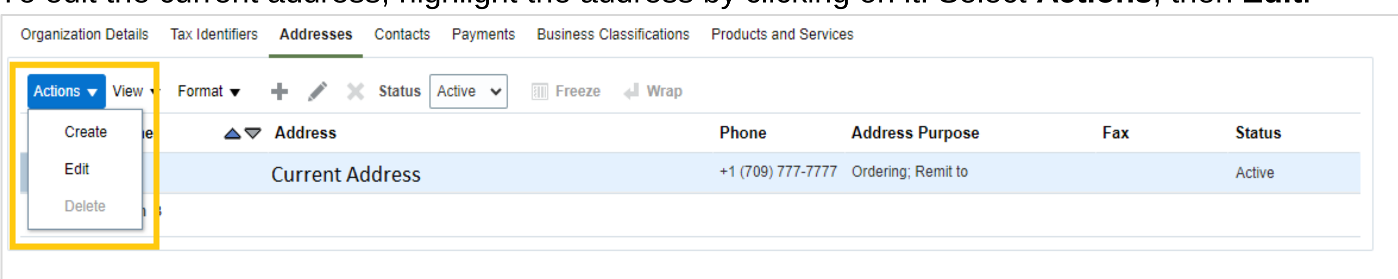
Update Organizational Details as required.



Editing Address

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.

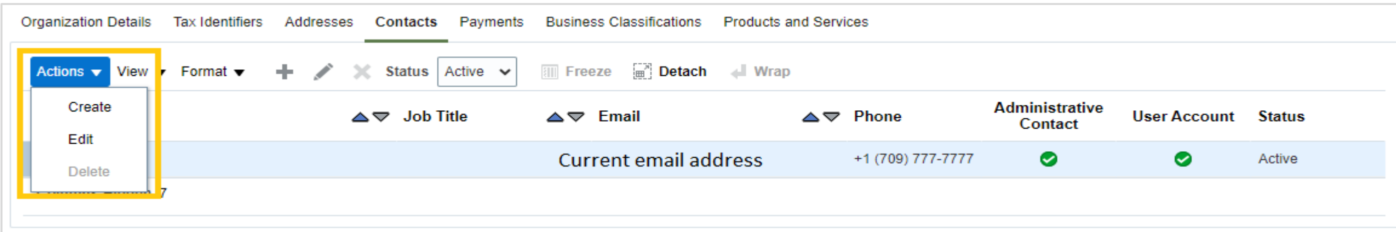
To edit the current address, highlight the address by clicking on it. Select **Actions**, then **Edit**.



Creating or Editing Contacts

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

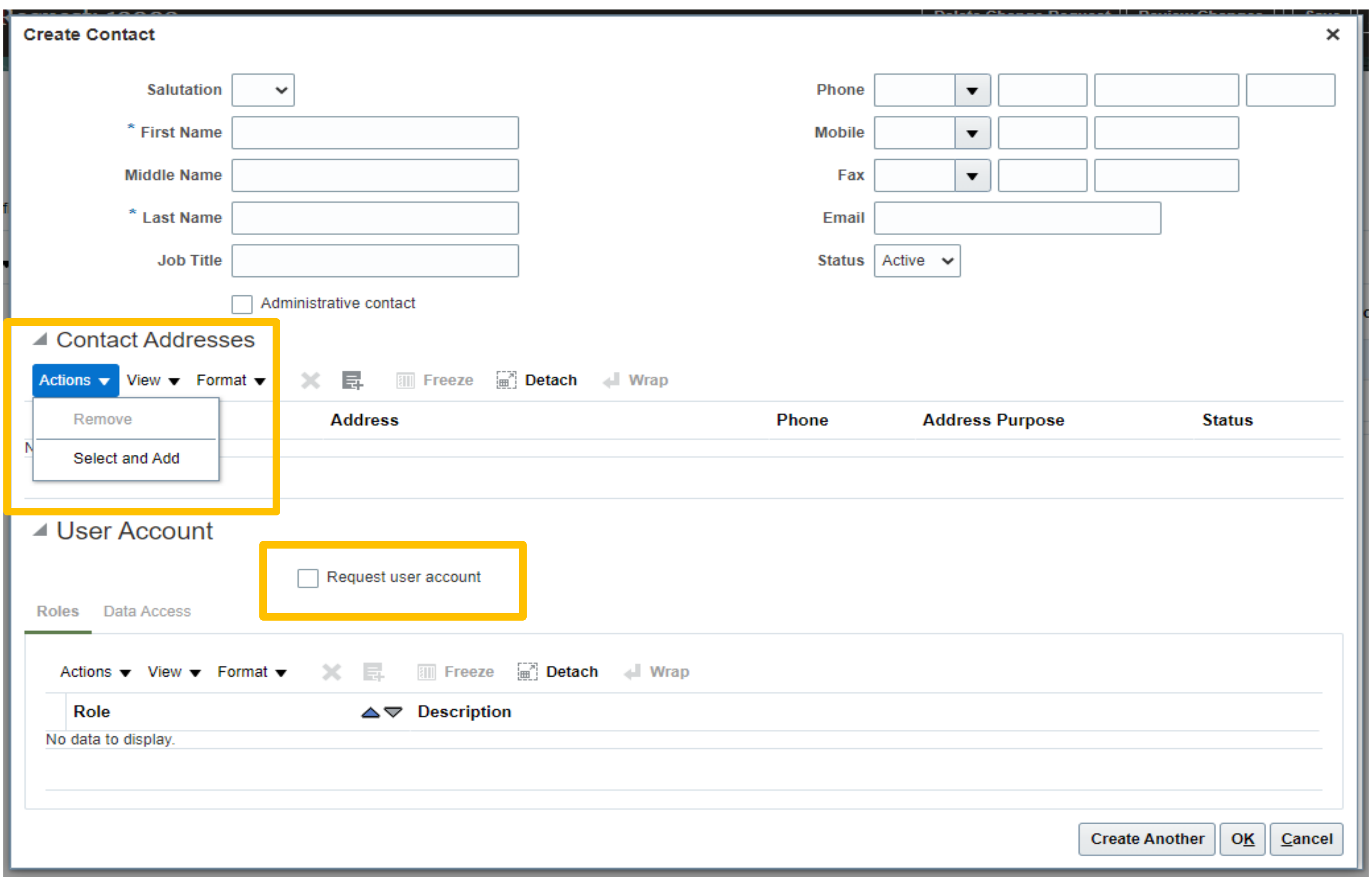
To create a new contact, select **Actions**, then **Create**.
To edit an existing contact, highlight the contact by clicking on it. Select **Actions**, then **Edit**.



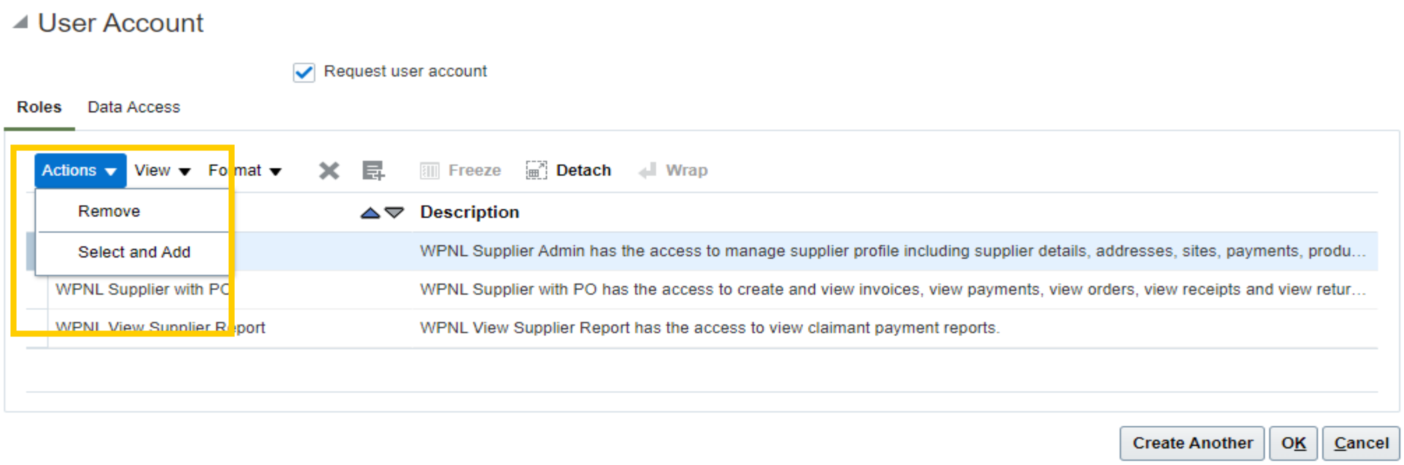
On the **Create Contact** screen, enter all contact information. Note: We recommend adding an email address although it is not indicated as mandatory.

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

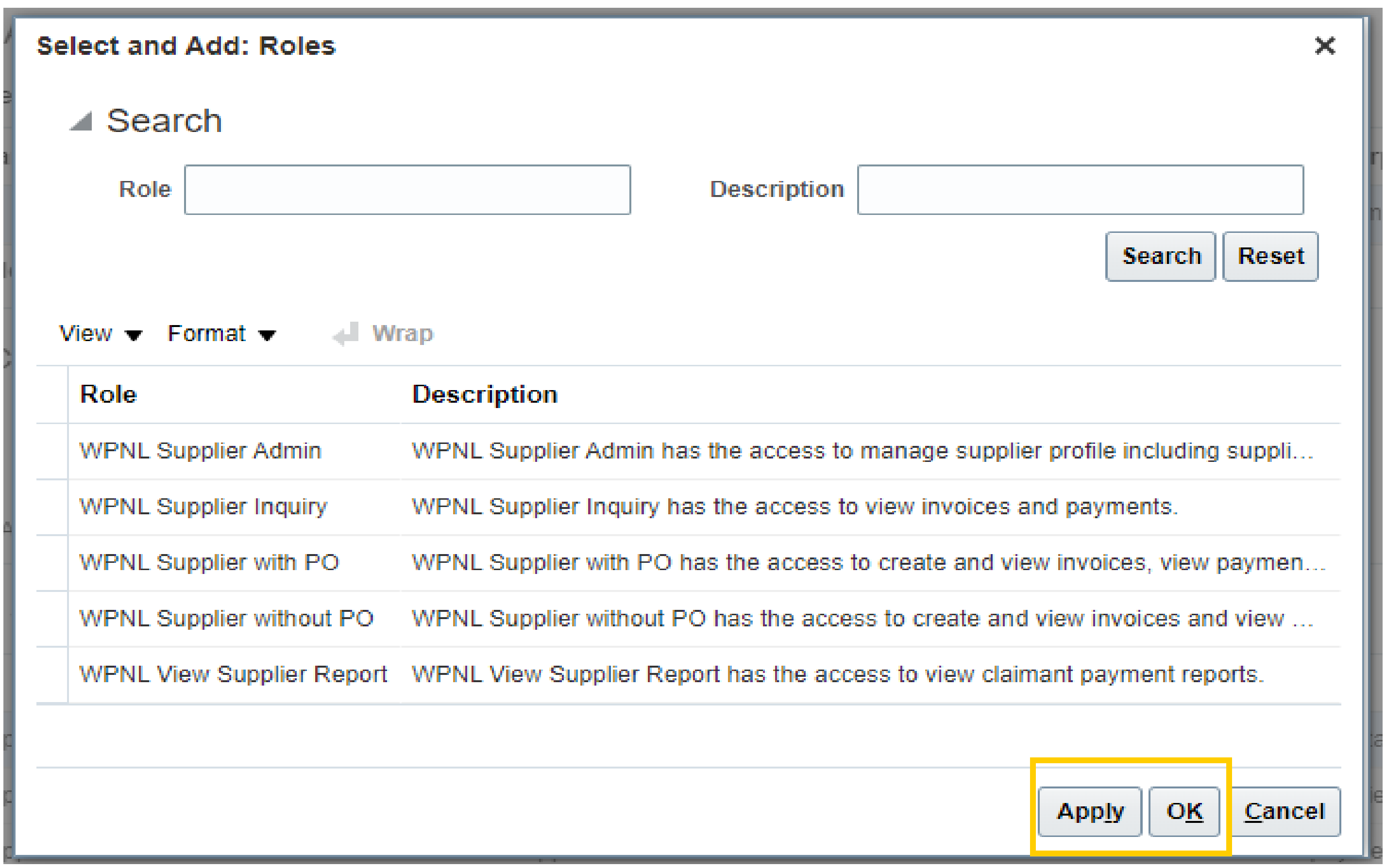
All contacts must be assigned a role(s) to provide system access.
In the **User Account** section, check **Request user account** and the default roles will appear.



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**. See additional information below on selecting access roles.



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



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.

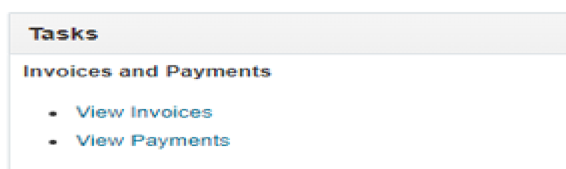
User Access	Oracle Supplier Portal Role Names				
	WPNL Supplier Admin	WPNL Supplier With PO	WPNL Supplier Without PO	WPNL Supplier Inquiry	WPNL View Supplier Report
Manage Orders		X			
Create Invoices		X	X		
View Invoices		X	X	X	
View Payments		X	X	X	
View Supplier Payments Report					X
Manage Company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

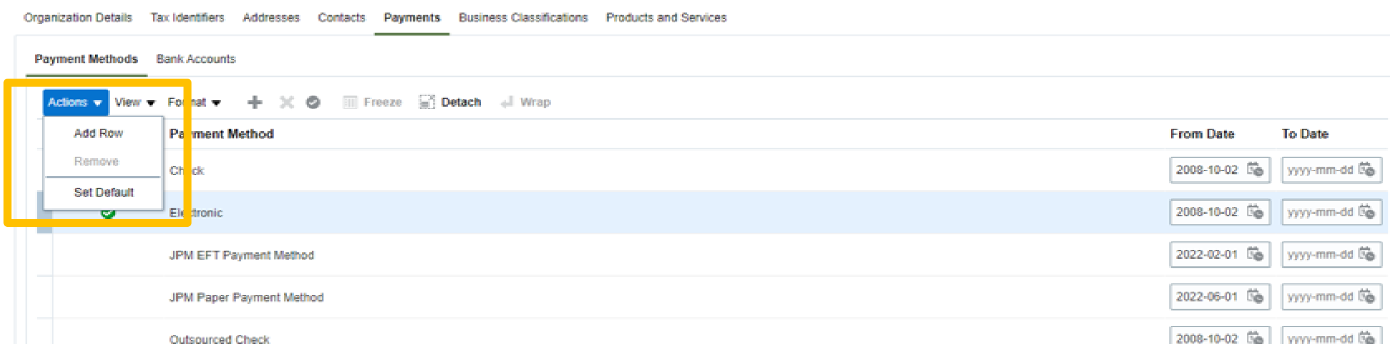
All roles assigned:

Only Supplier Inquiry role assigned:



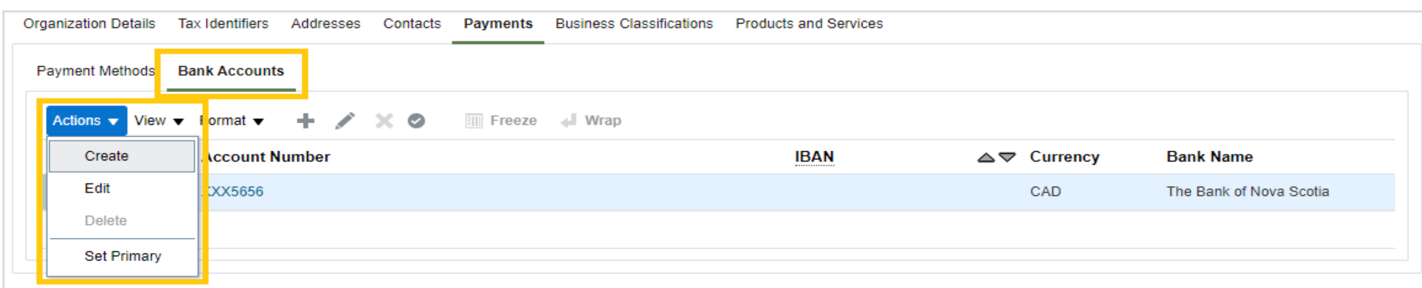
Editing Payments

To change your preferred **Payment Method**, first highlight the current method by clicking on it. Select **Actions,** then **Set Default**.

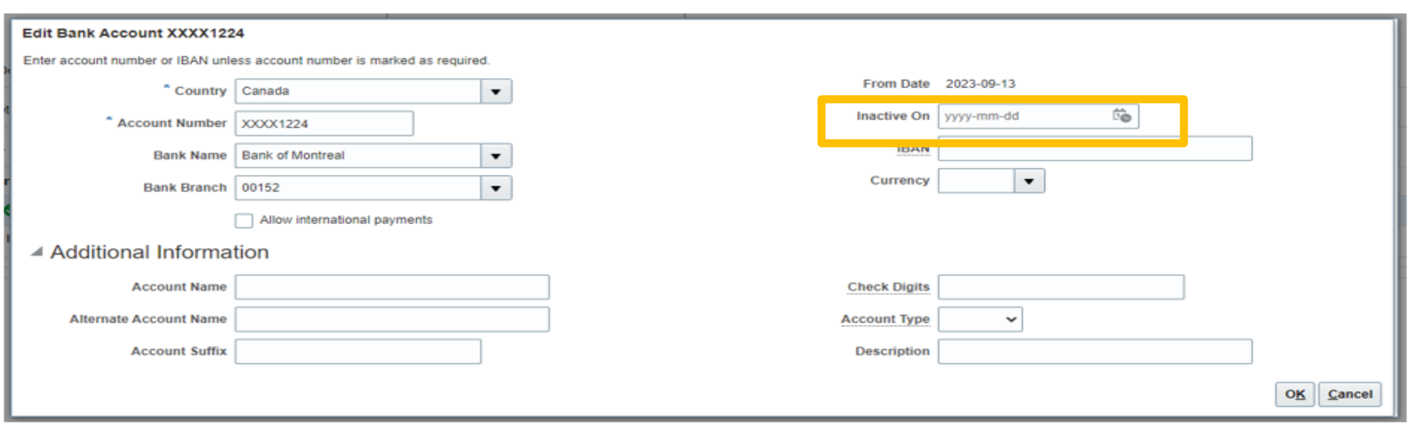


To add a new bank account, select **Actions**, then **Create.**
NOTE: If you have an existing bank account on your profile and are adding a new one, you must inactivate the old bank account first. If you edit the existing bank account, all payment history related to that bank account will be lost. See below on how to inactivate a bank account.

To designate a **Bank Account** as your primary account, highlight the account by clicking on it. Select **Actions**, then **Set Primary.**



To Inactivate a bank account, select **Actions**, then **Edit**. Enter an **Inactive On** date and click okay.



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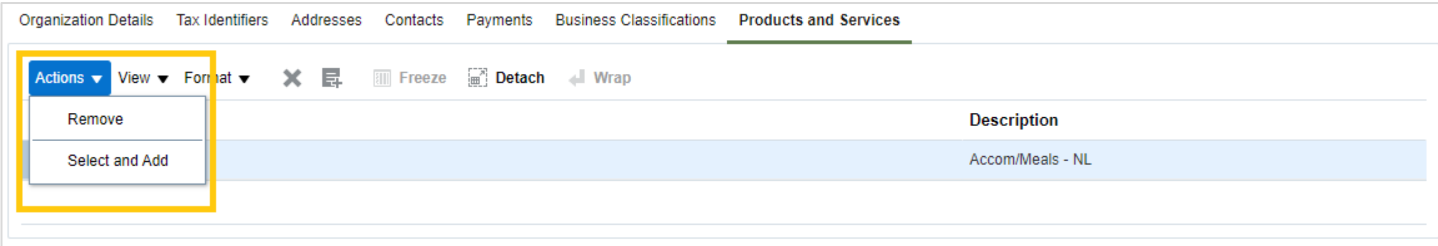
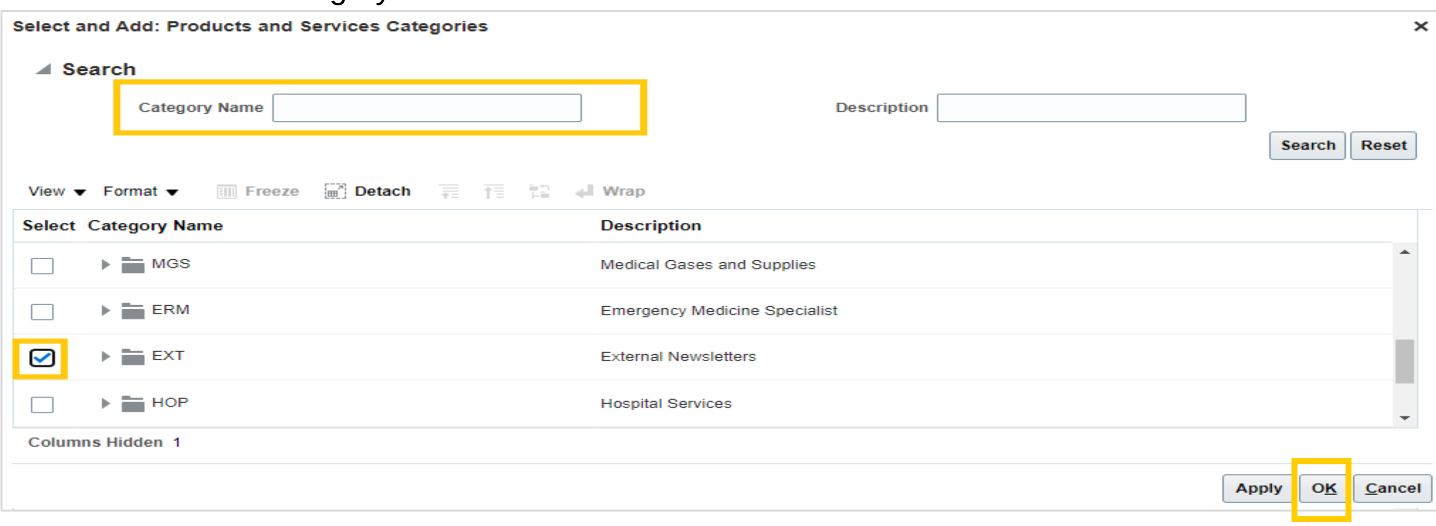
Editing Products and Services

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**.

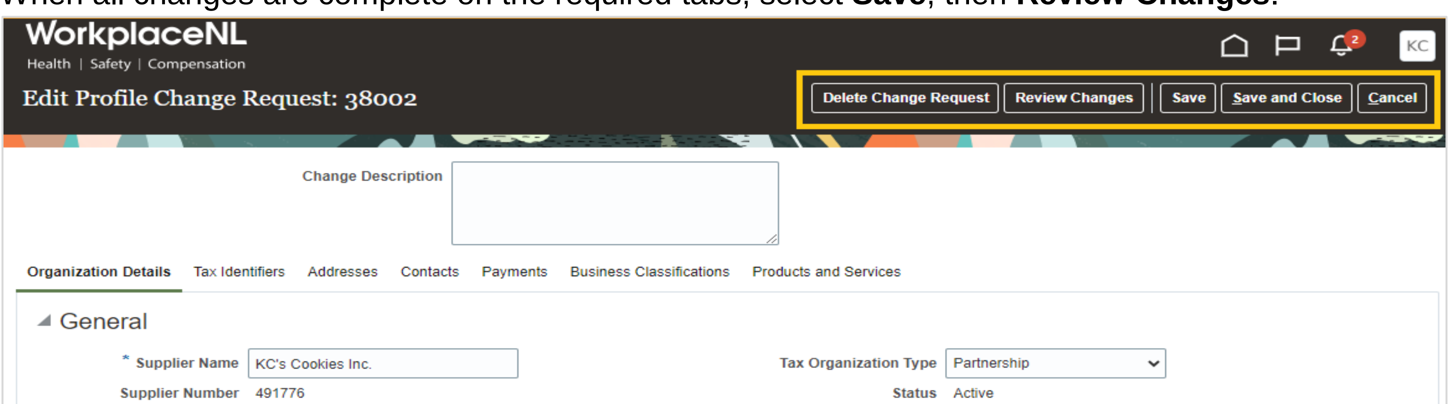


On the **Select and Add** pop-up box, search by **Category Name** or select from the list by checking the box beside the category. Then select **OK**.



Reviewing and Submitting

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.