

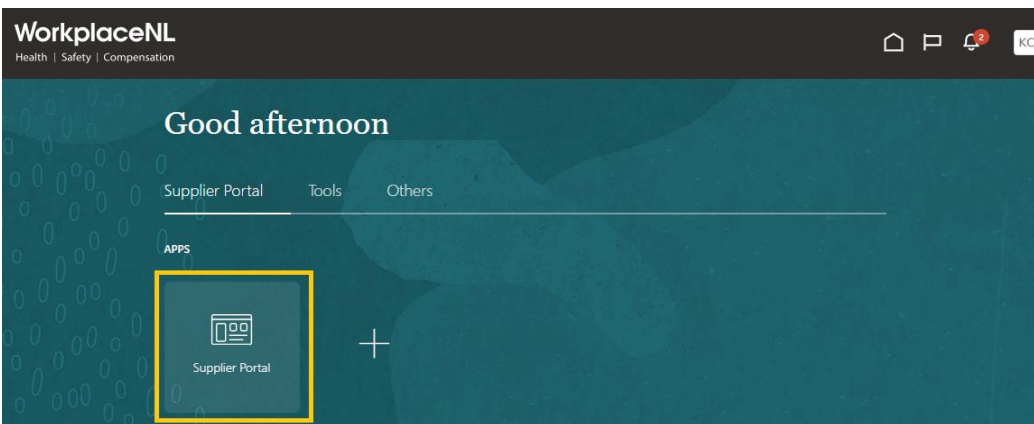
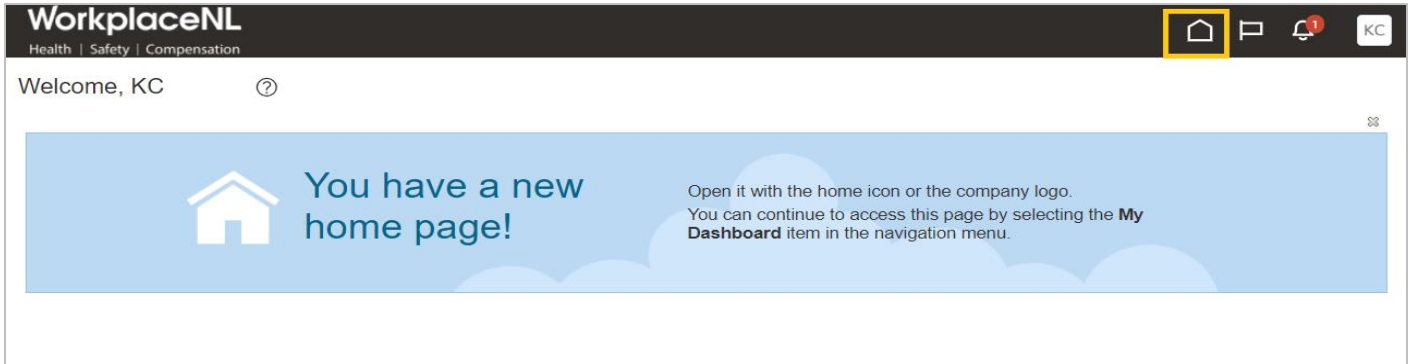
Managing Your Company Profile

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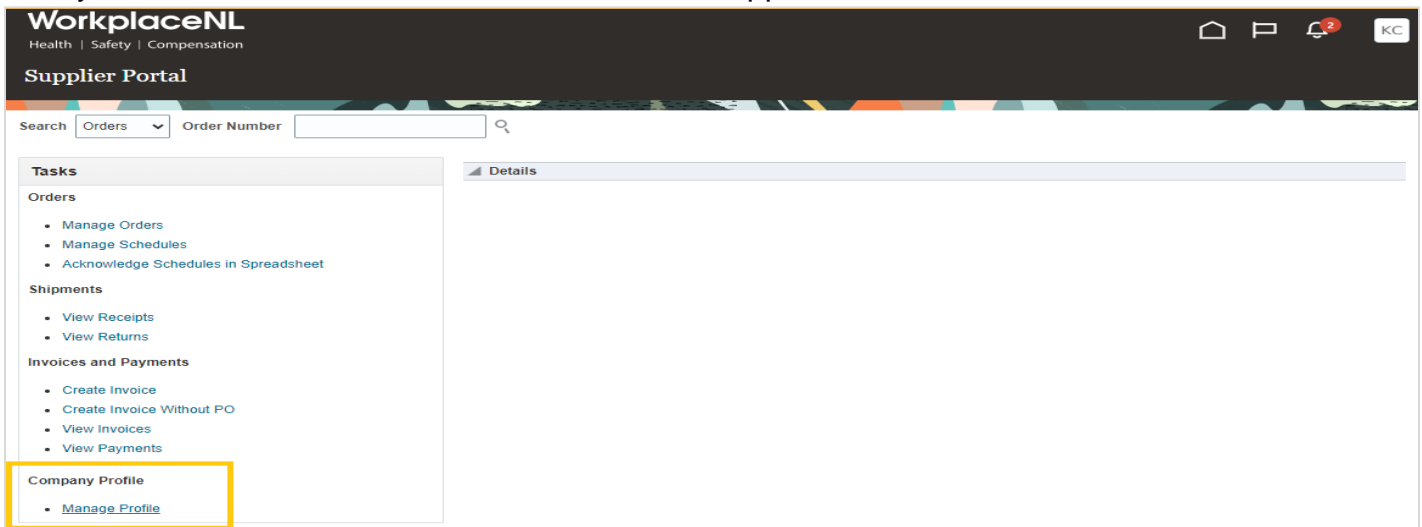
Managing Your Company Profile

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.

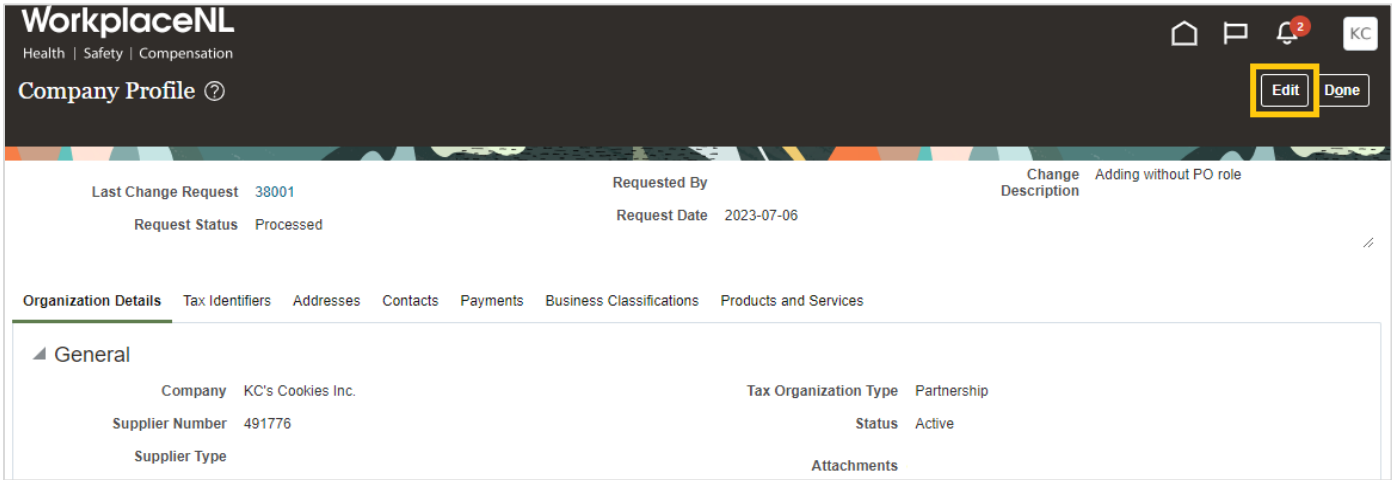
After you log in, select the home icon and then **Supplier Portal**.



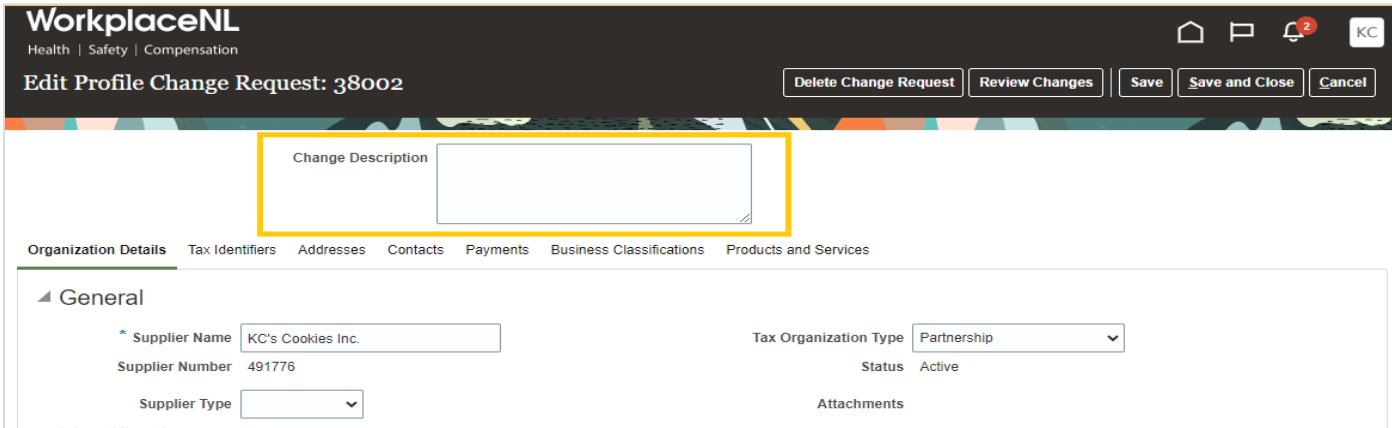
To manage your company details, select **Manage Profile** from the left-hand **Task** menu. This option is only available to users/contacts with the WPNL Supplier Admin role.



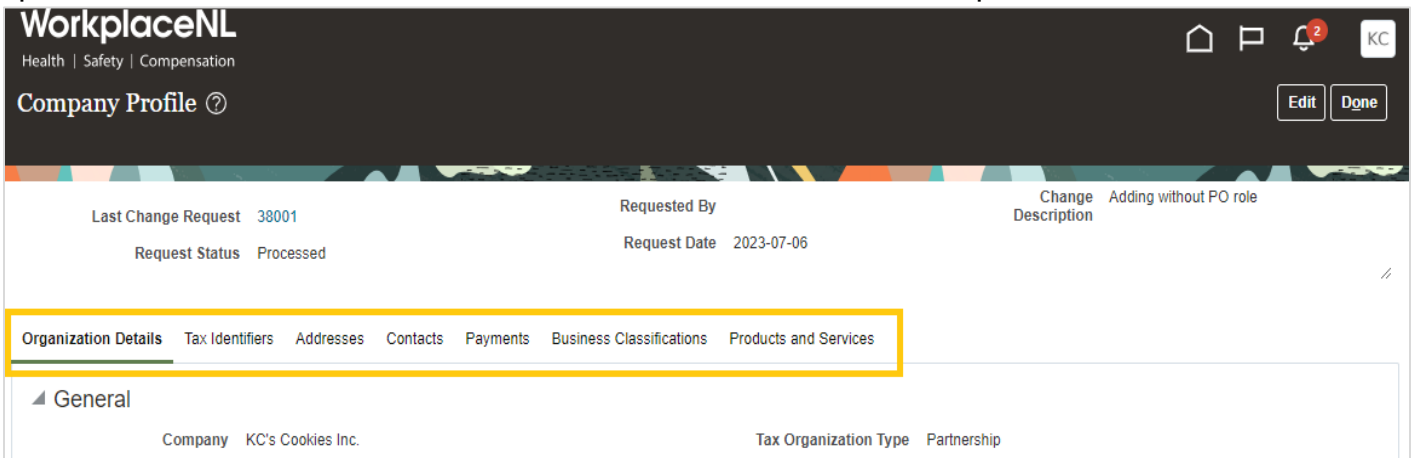
Select **Edit**.



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.



Editing Organization Details

Update Organizational Details as required.

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

General

* Supplier Name Tax Organization Type

Supplier Number Status

Supplier Type

Attachments + X

Identification

D-U-N-S Number

Customer Number National Insurance Number

SIC

Corporate Web Site

Corporate Profile

Year Established

Mission Statement

Chief Executive Title

Chief Executive Name

Principal Title

Principal Name

Year Incorporated

Financial Profile

Fiscal Year End Month

Current Fiscal Year's Potential Revenue

Preferred Functional Currency

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**.

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

Actions View Format + X Status Freeze Wrap

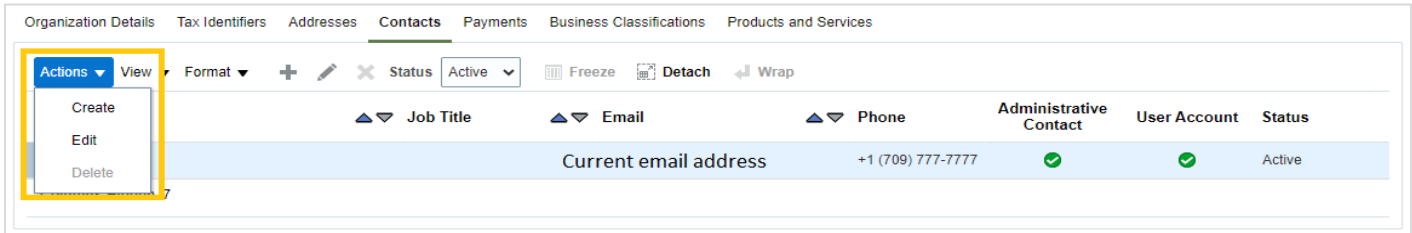
Address	Phone	Address Purpose	Fax	Status
Current Address	+1 (709) 777-7777	Ordering; Remit to		Active

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**.



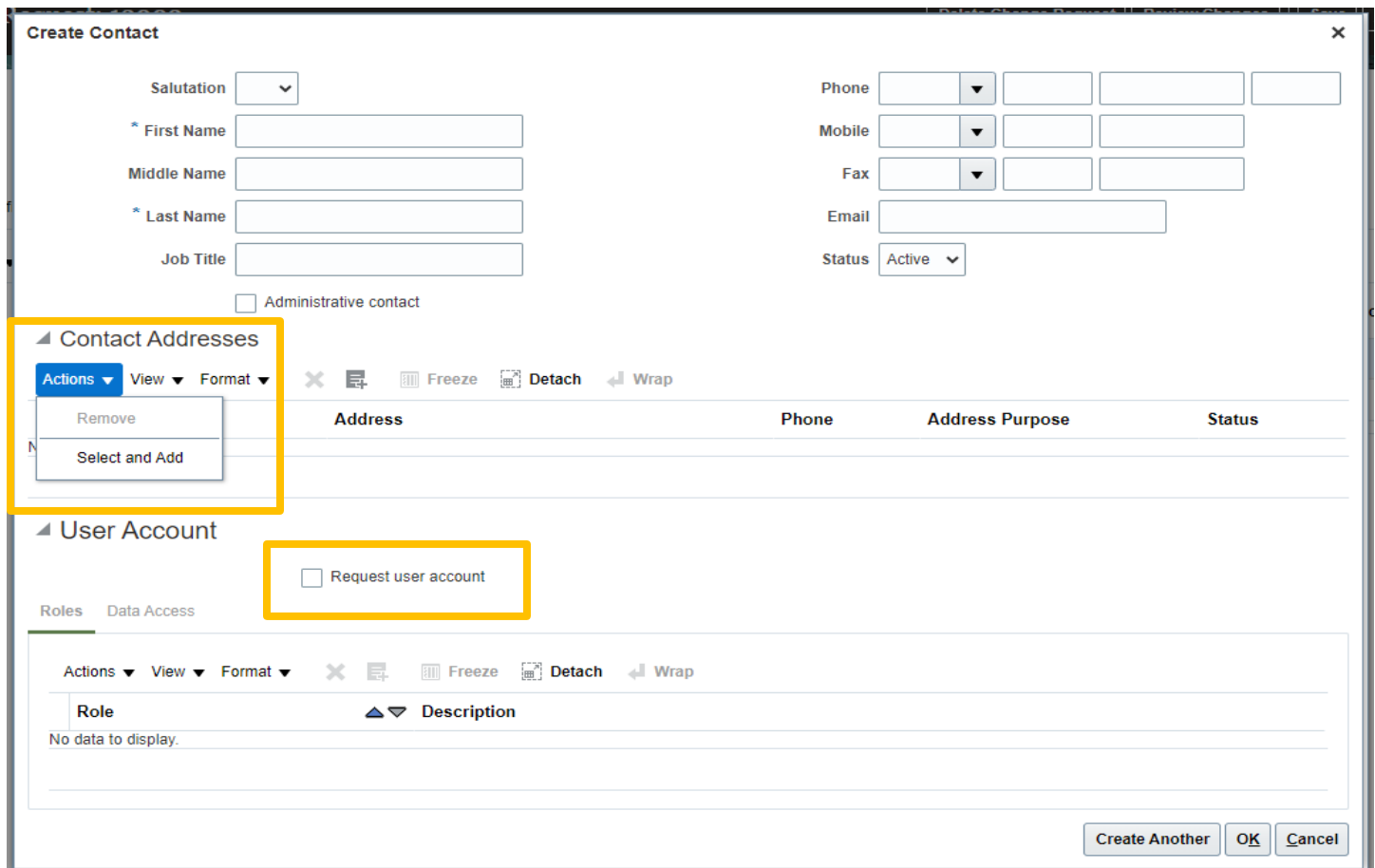
On the **Create Contact** screen, enter all contact information. Note: We recommend adding an email address although it is not indicated as mandatory.

Once the contact information is 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.

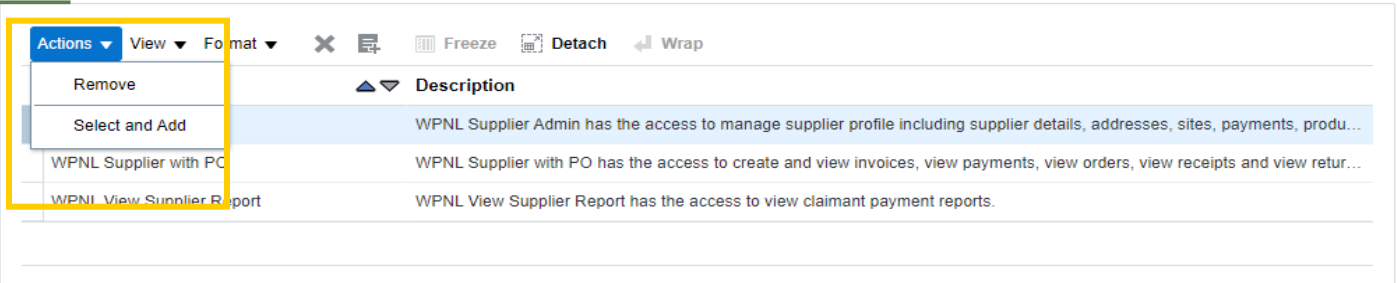


To remove a default role, highlight the role by clicking on it. Select **Actions**, then **Remove**. To add a different role, select **Actions**, then **Select and Add**. See additional information below on selecting access roles.

◀ User Account

Request user account

Roles Data Access

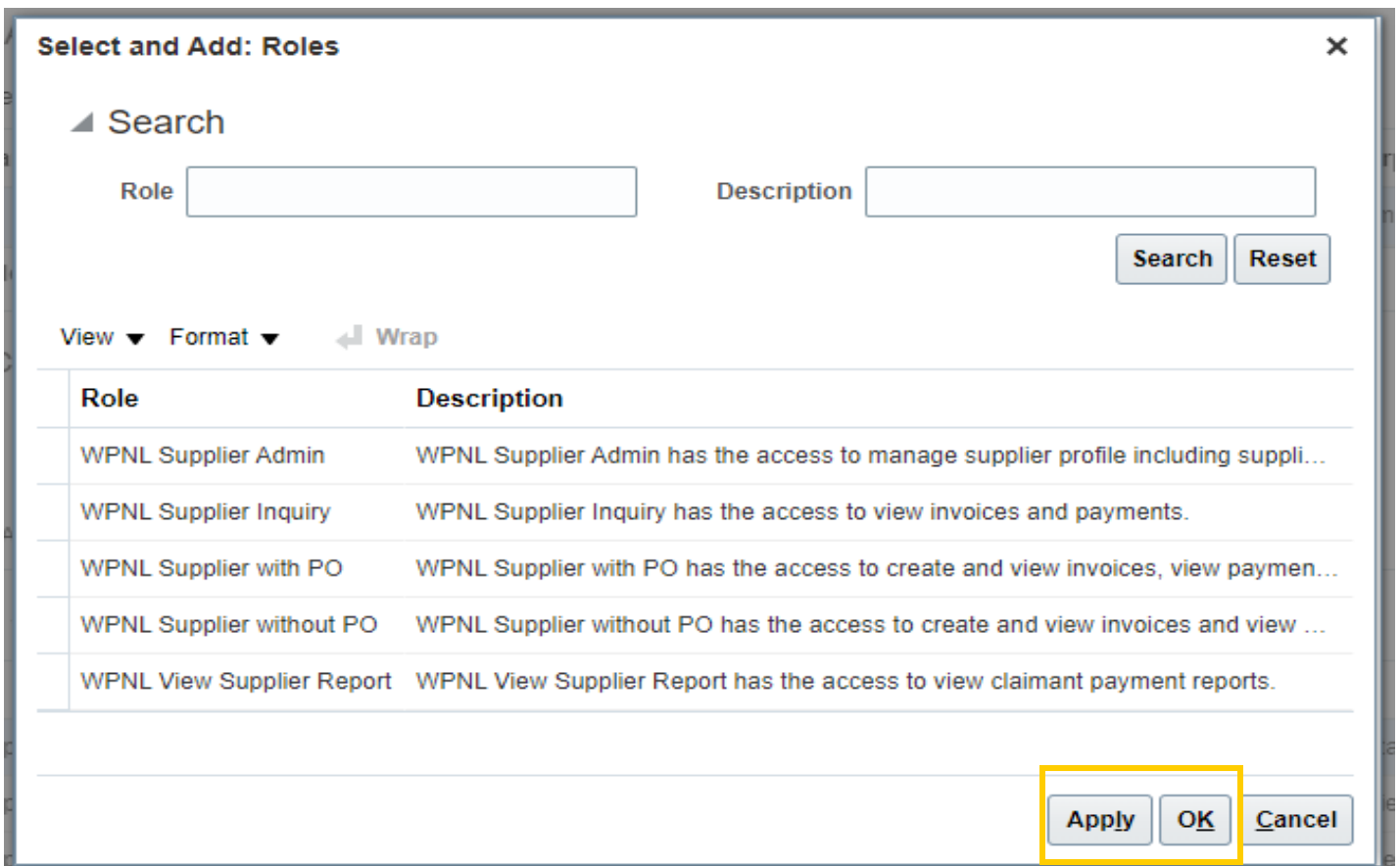


The screenshot shows a table with columns for Role and Description. The 'Actions' menu is open, highlighting 'Remove' and 'Select and Add'. The table contains the following data:

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.

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, click **Apply**, then **OK**. See additional information below 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.

Select and Add: Roles

◀ Search

Role Description

Search Reset

View ▼ Format ▼ Wrap

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.

Apply OK Cancel

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:

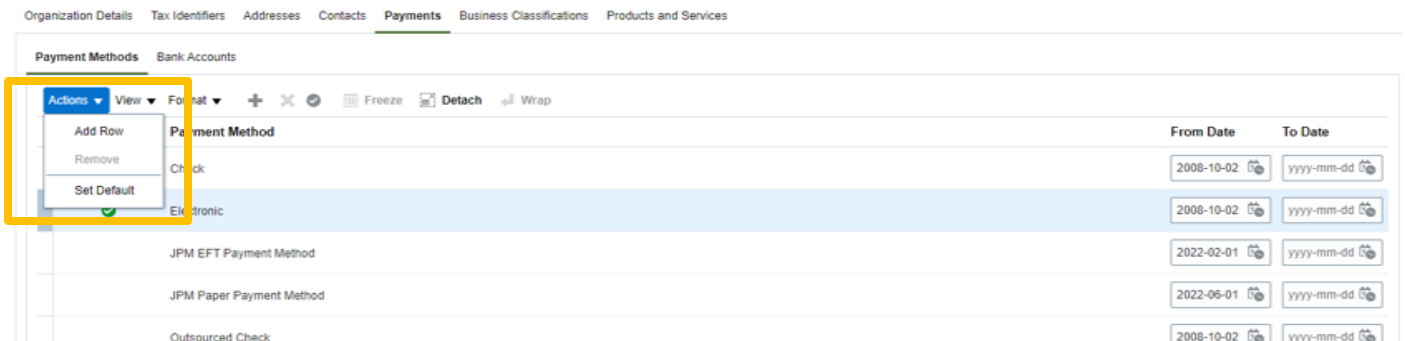
Tasks
Orders <ul style="list-style-type: none"> Manage Orders Manage Schedules Acknowledge Schedules in Spreadsheet
Shipments <ul style="list-style-type: none"> View Receipts View Returns
Invoices and Payments <ul style="list-style-type: none"> Create Invoice Create Invoice Without PO View Invoices View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

Only Supplier Inquiry role assigned:

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

Editing Payments

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

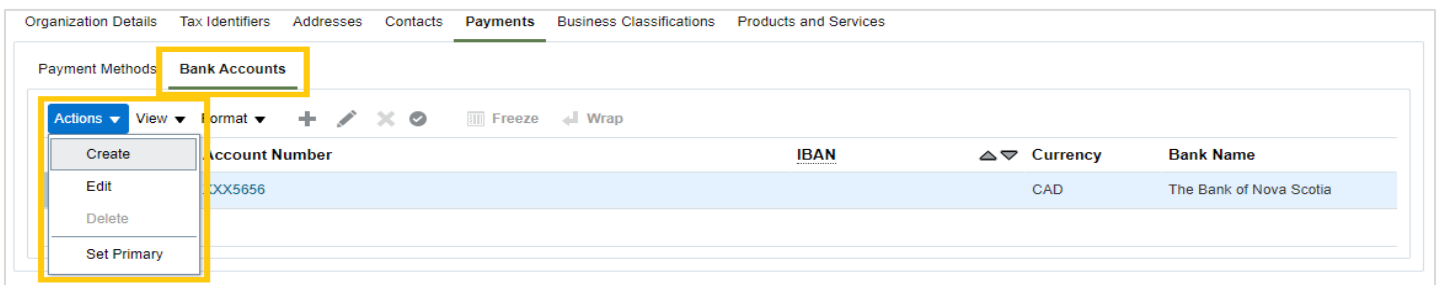


The screenshot shows the 'Payments' section of a software interface. At the top, there are navigation tabs: Organization Details, Tax Identifiers, Addresses, Contacts, **Payments**, Business Classifications, and Products and Services. Below these, there are two sub-sections: 'Payment Methods' and 'Bank Accounts'. The 'Payment Methods' table is visible, with columns for 'Payment Method', 'From Date', and 'To Date'. The 'Electronic' method is highlighted in blue. A yellow box highlights the 'Actions' dropdown menu, which is open and shows options: 'Add Row', 'Remove', and 'Set Default'. The 'Set Default' option is highlighted in blue.

To add a new bank account, select **Actions**, then **Create**.

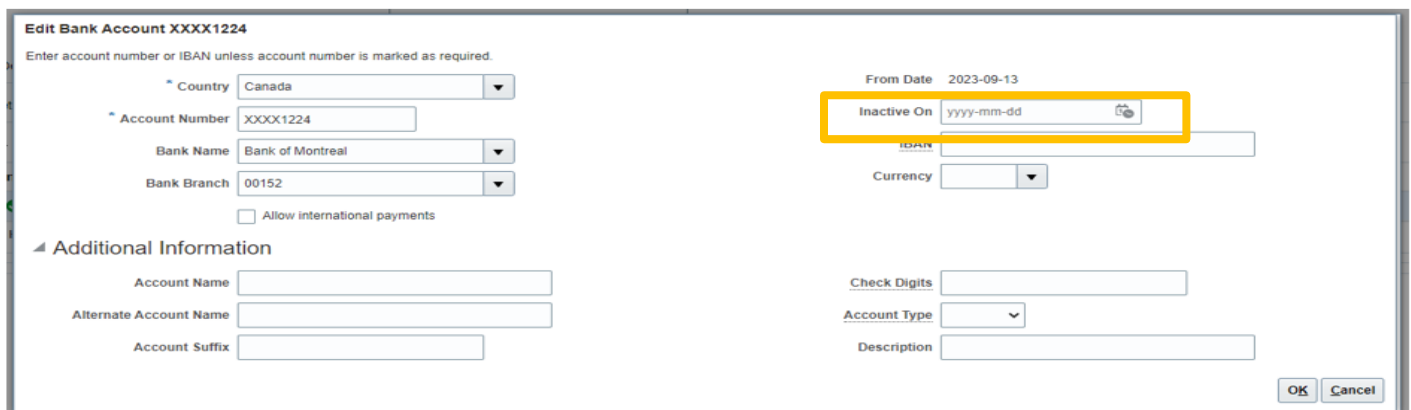
NOTE: If you have an existing bank account on your profile and are adding a new one, you must inactivate the old bank account first. If you edit the existing bank account, all payment history related to that bank account will be lost. See below on how to inactivate a bank account.

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



The screenshot shows the 'Bank Accounts' section of a software interface. At the top, there are navigation tabs: Organization Details, Tax Identifiers, Addresses, Contacts, **Payments**, Business Classifications, and Products and Services. Below these, there are two sub-sections: 'Payment Methods' and 'Bank Accounts'. The 'Bank Accounts' table is visible, with columns for 'Account Number', 'IBAN', 'Currency', and 'Bank Name'. The account with 'XXX5656' is highlighted in blue. A yellow box highlights the 'Actions' dropdown menu, which is open and shows options: 'Create', 'Edit', 'Delete', and 'Set Primary'. The 'Set Primary' option is highlighted in blue.

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

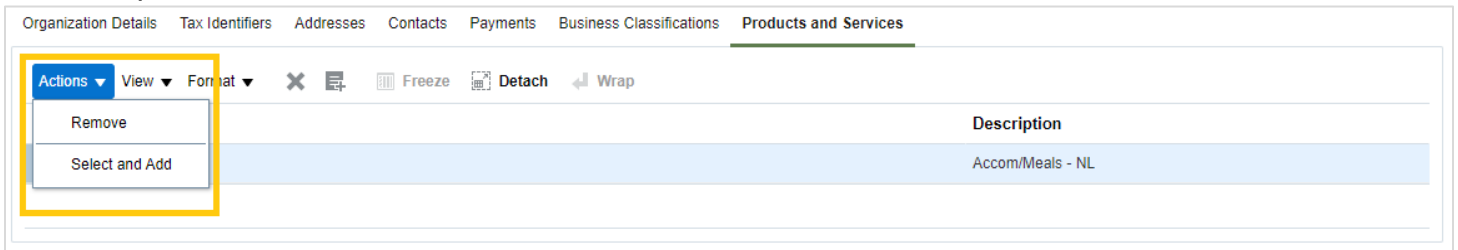


The screenshot shows the 'Edit Bank Account XXXX1224' form. The form has a title 'Edit Bank Account XXXX1224' and a subtitle 'Enter account number or IBAN unless account number is marked as required.' The form contains several fields: 'Country' (Canada), 'Account Number' (XXXX1224), 'Bank Name' (Bank of Montreal), 'Bank Branch' (00152), 'From Date' (2023-09-13), 'Inactive On' (yyyy-mm-dd), 'IBAN', 'Currency', 'Account Name', 'Alternate Account Name', 'Account Suffix', 'Check Digits', 'Account Type', and 'Description'. A yellow box highlights the 'Inactive On' field. At the bottom right, there are 'OK' and 'Cancel' buttons.

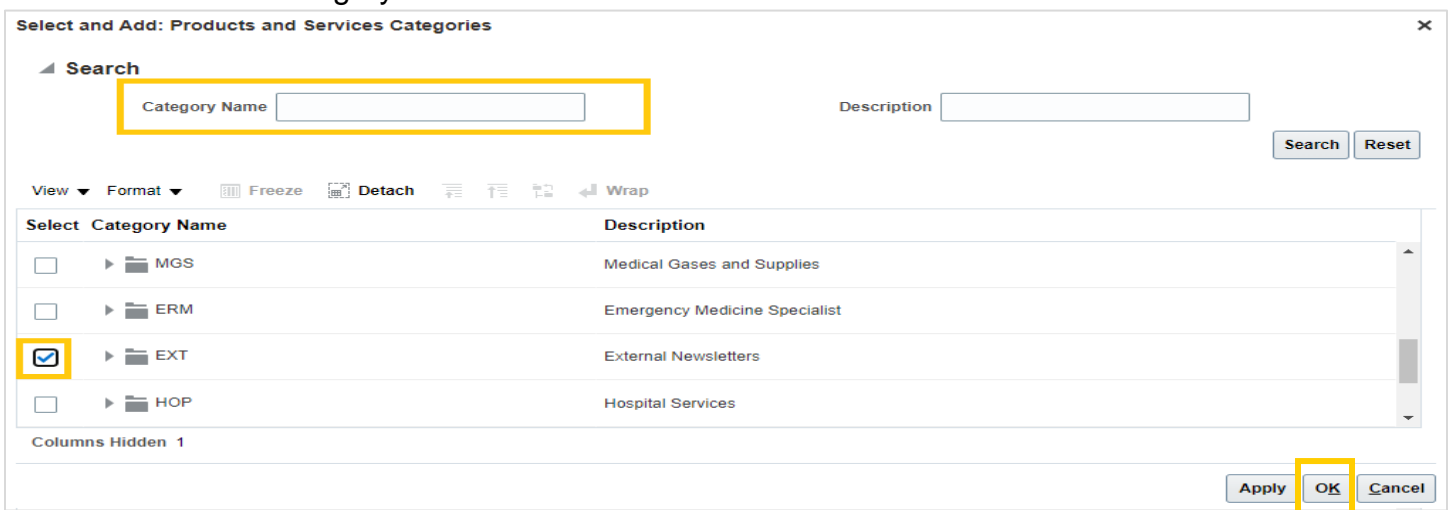
Editing Products and Services

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**.

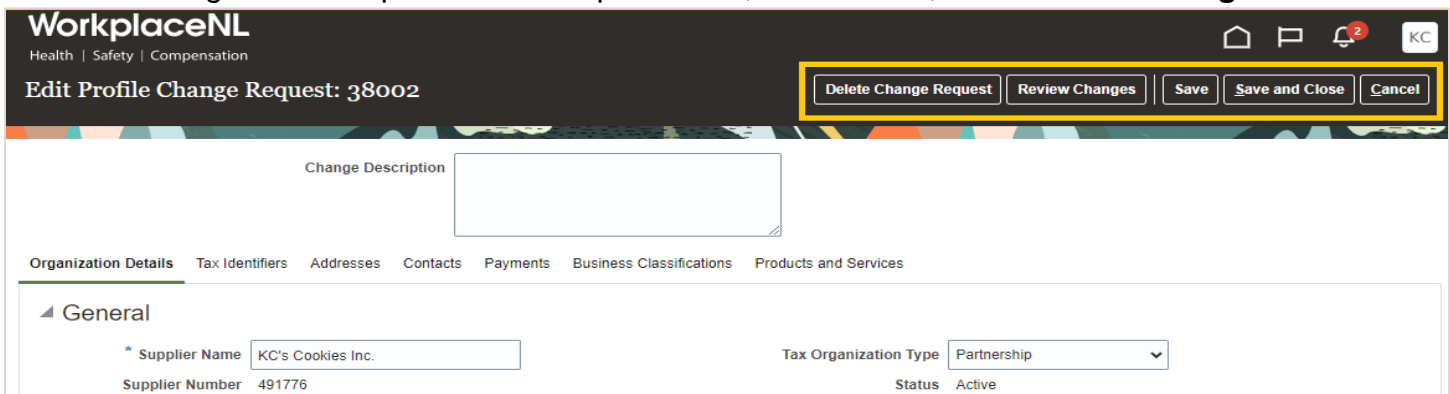


On the **Select and Add** pop-up box, search by **Category Name** or select from the list by checking the box beside the category. Then select **OK**.



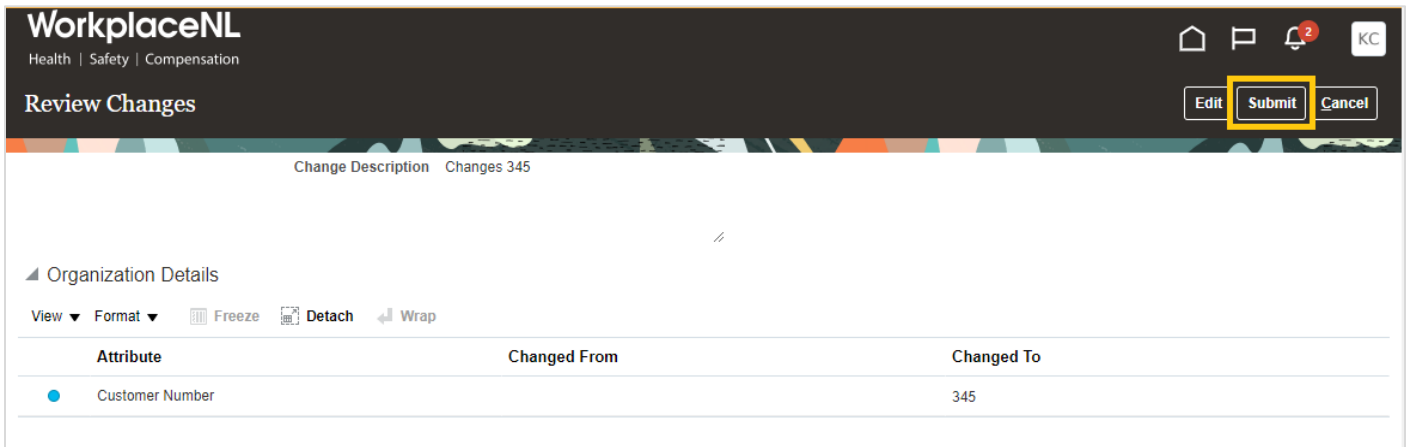
Reviewing and Submitting

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.



The screenshot shows the WorkplaceNL interface for reviewing changes. The top navigation bar includes the logo, navigation links, and user profile. The main content area is titled 'Review Changes' and contains a table of changes. The 'Submit' button is highlighted with a yellow box.

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