METROLINX

Manage Profile and Account Settings

Version No: 1.0
Date: 07/09/2023

Overview
This document provides you the steps to manage profile and account settings.

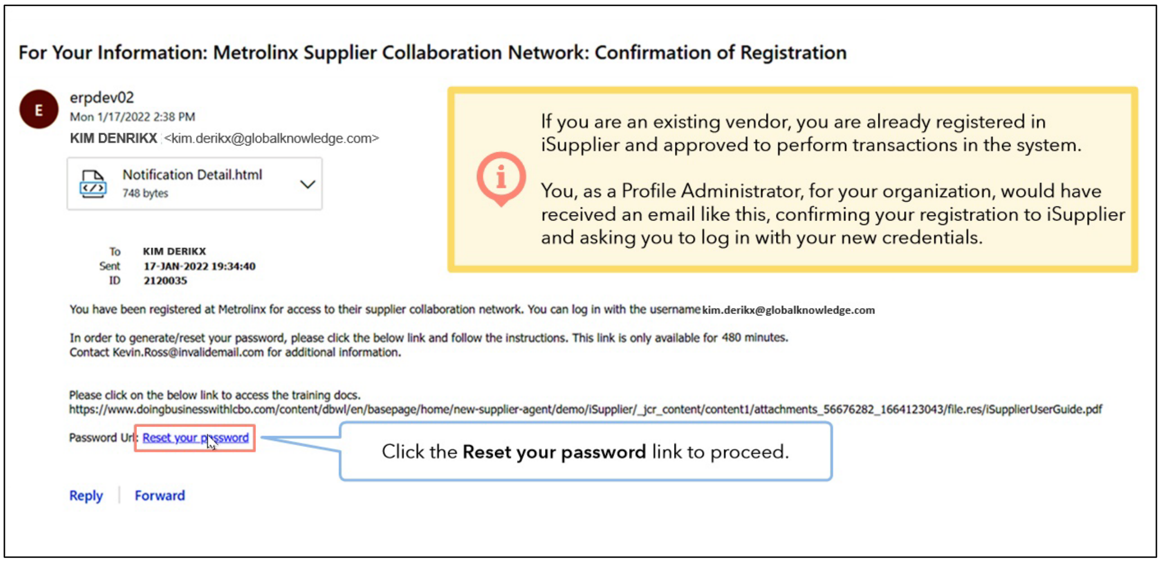
Manage Profile and Account Settings

If you are an existing vendor, you are already registered in iSupplier and approved to perform transactions in the system.

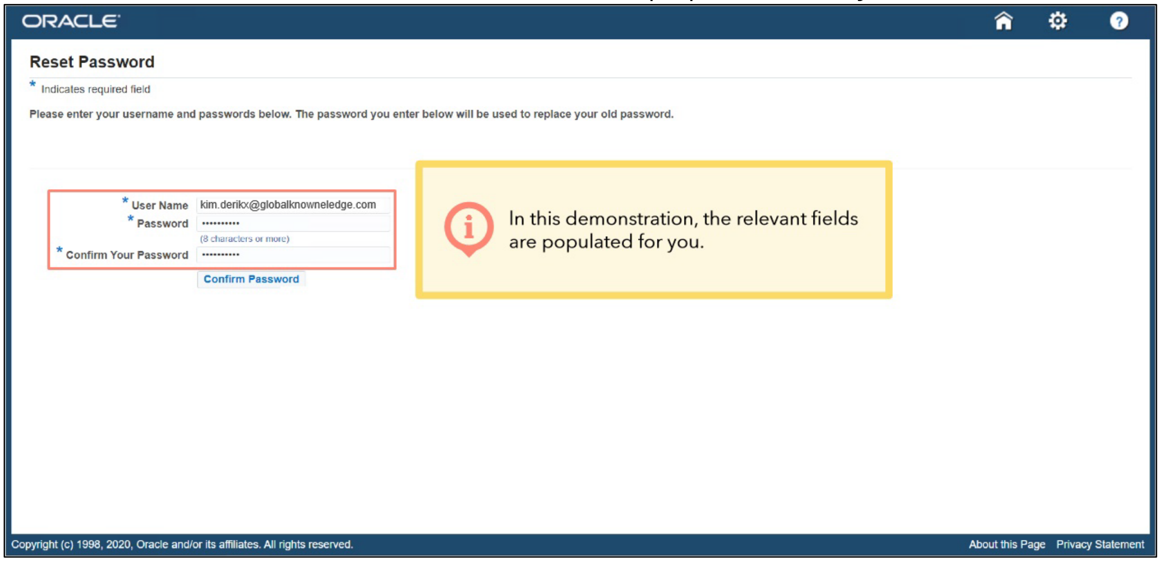
You, as a Profile Administrator, for your organization, would have received an email like this, confirming your registration to iSupplier and asking you to log in with your new credentials.

Follow the steps below to manage profile and account settings:

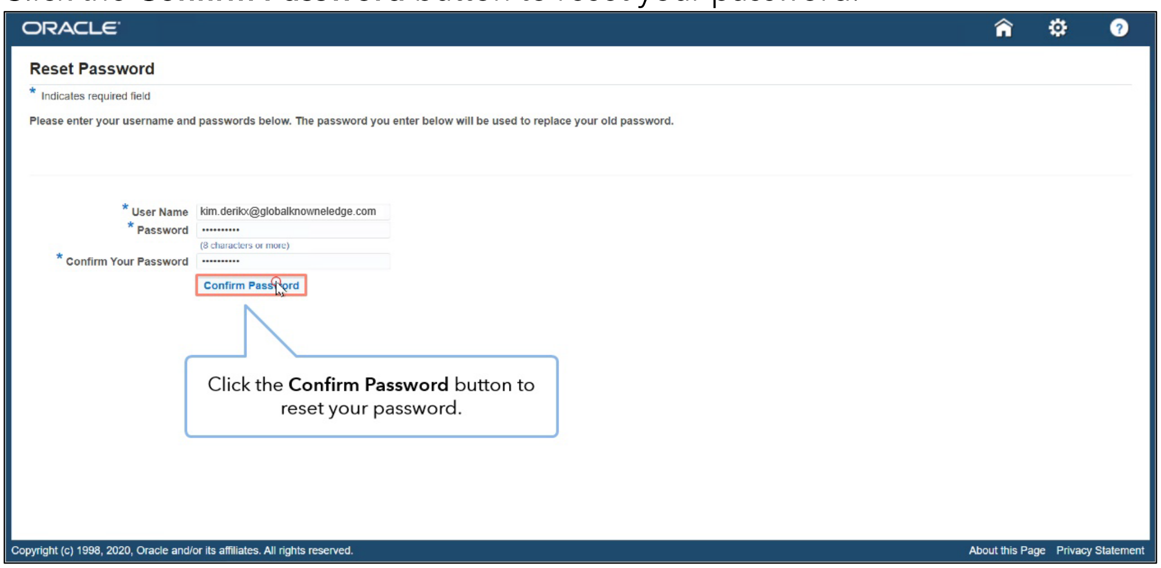
1. Click the **Reset your password** link to proceed.



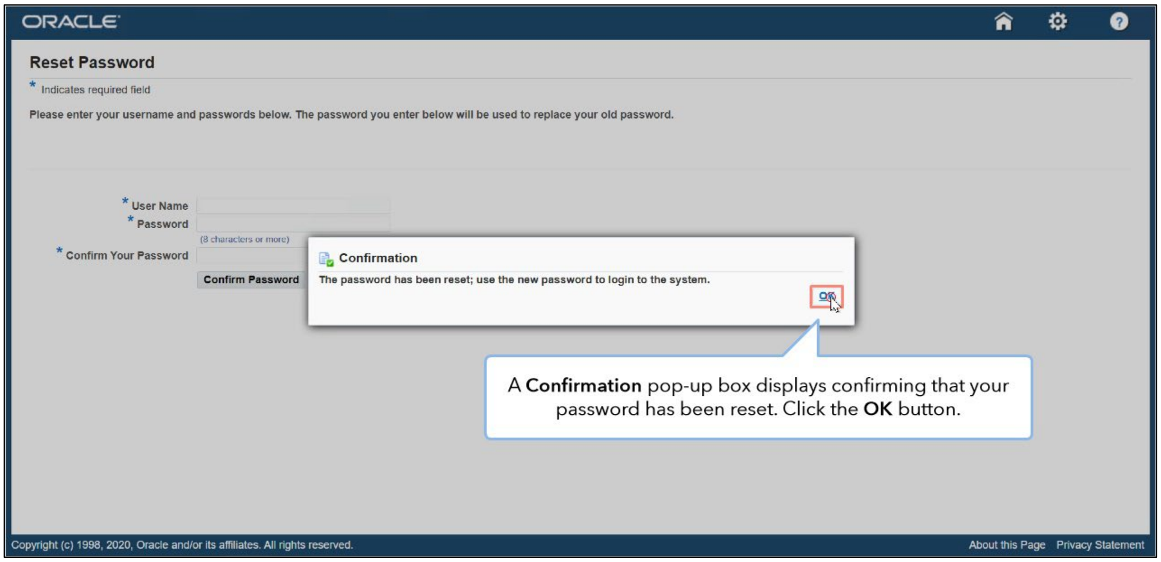
In this demonstration, the relevant fields are populated for you.



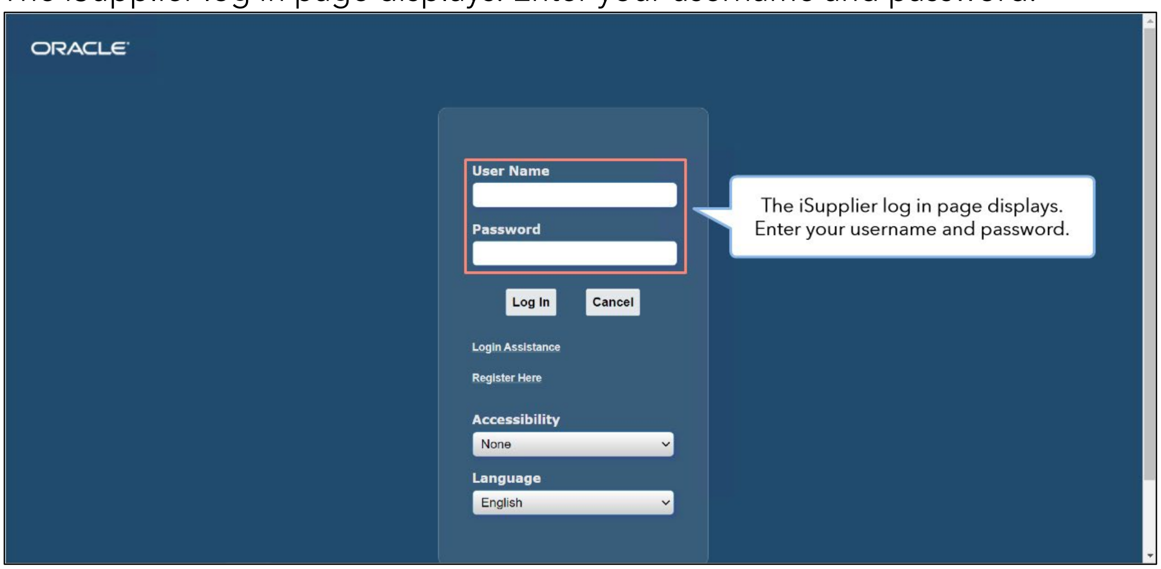
2. Click the **Confirm Password** button to reset your password.



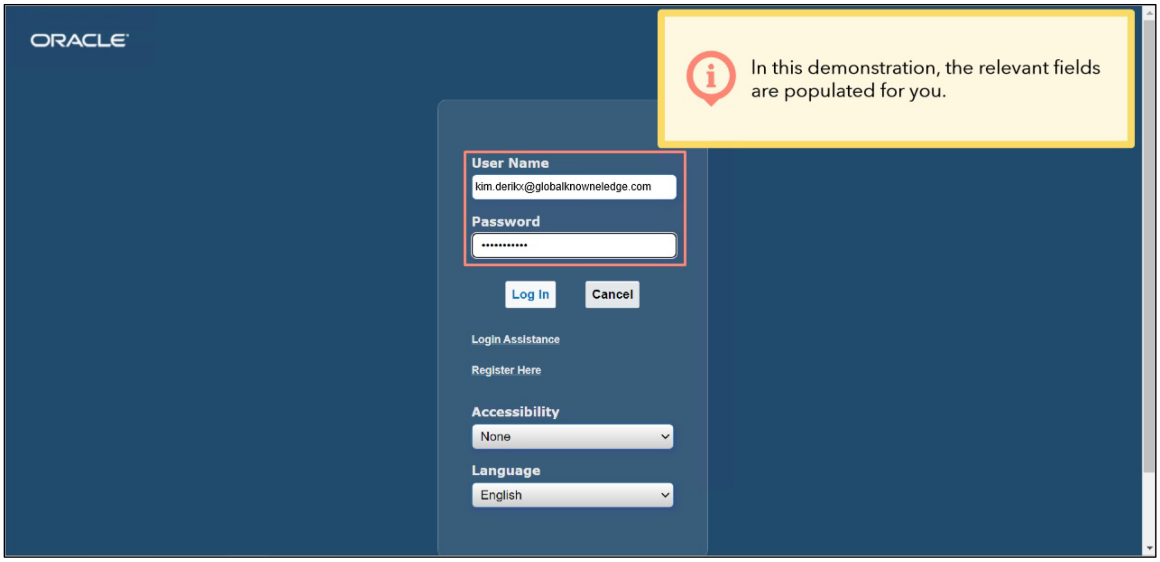
3. A **Confirmation** pop-up box displays confirming that your password has been reset. Click the **OK** button.



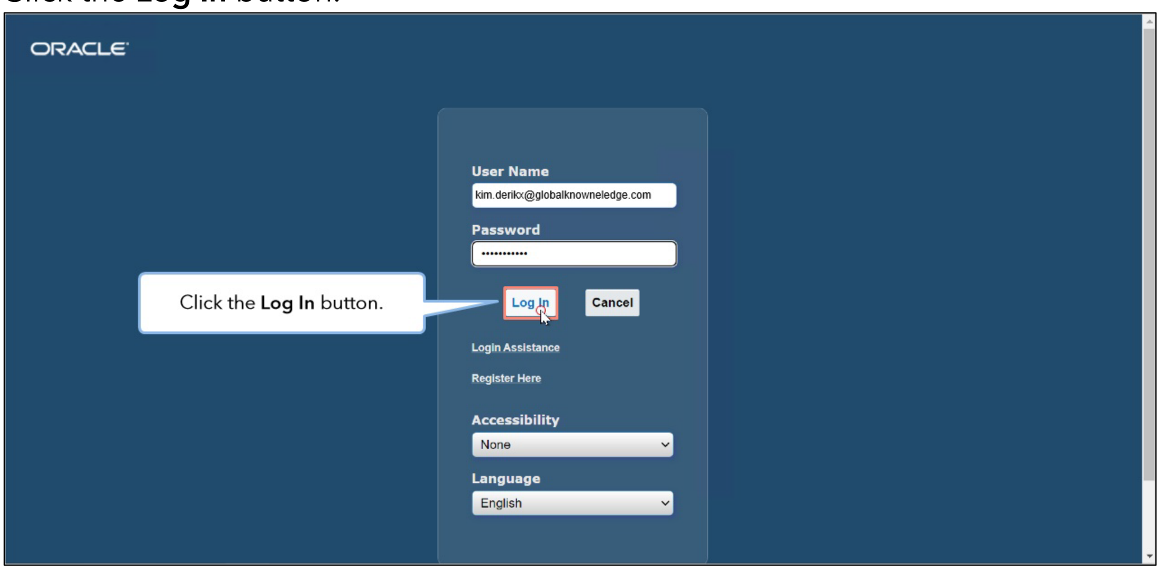
4. The iSupplier log in page displays. Enter your username and password.



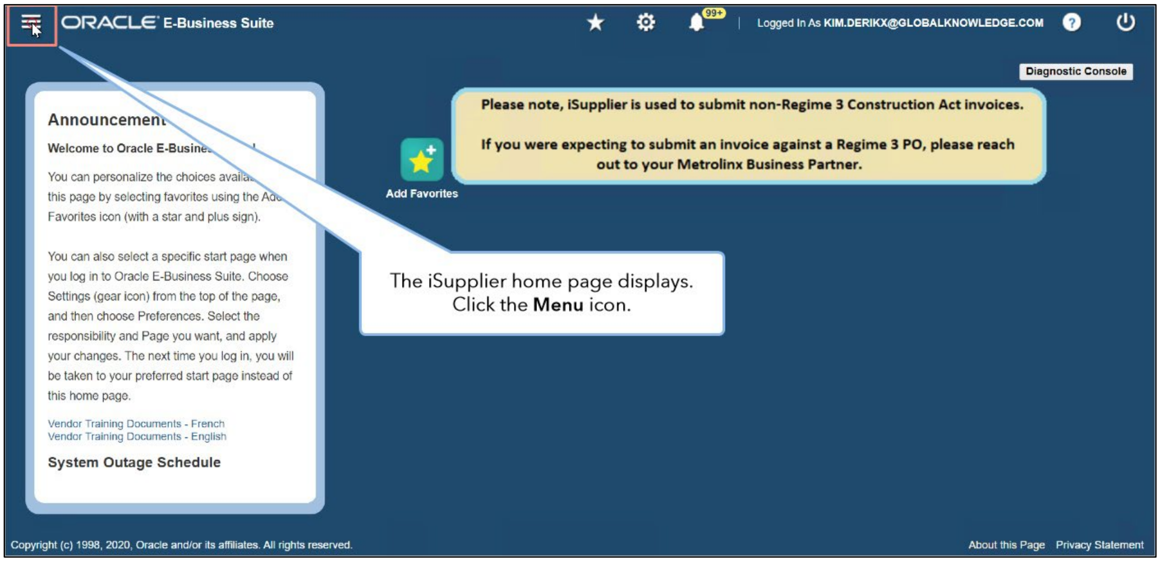
In this demonstration, the relevant fields are populated for you.



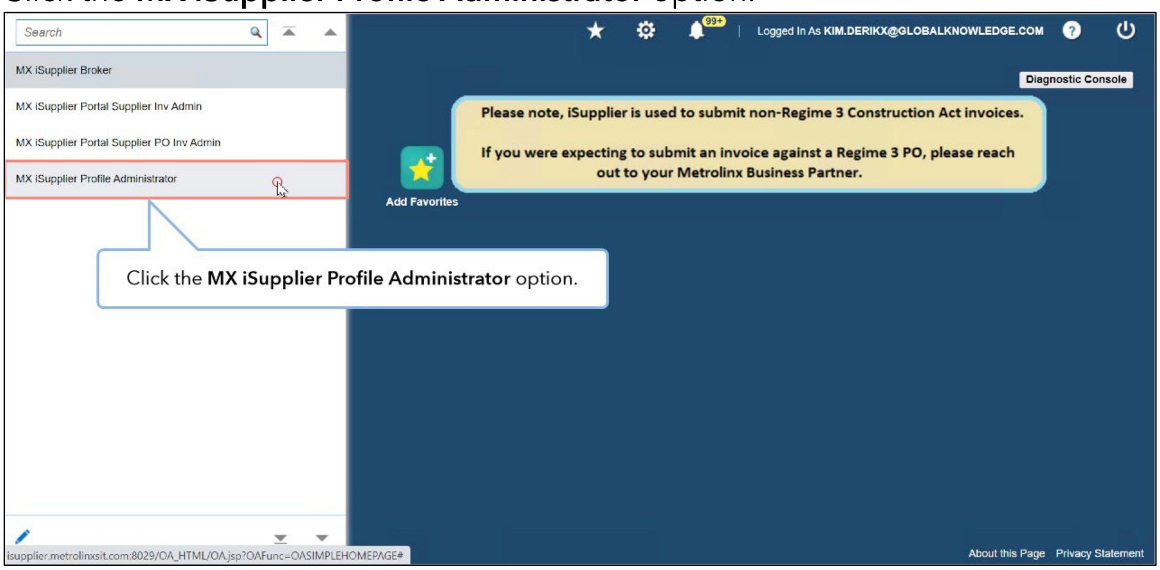
5. Click the **Log In** button.



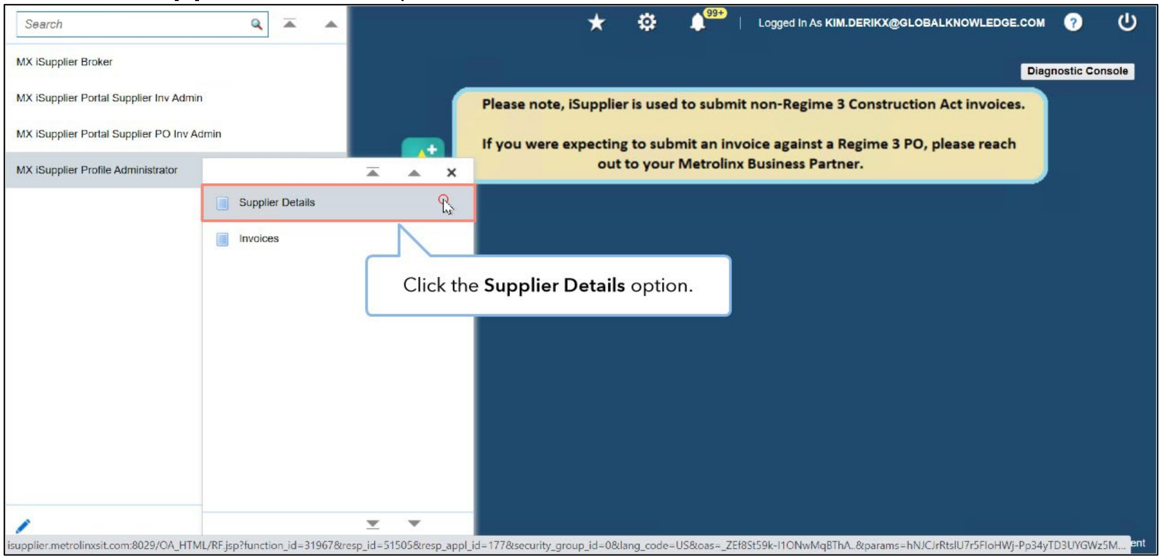
6. The iSupplier home page displays. Click the **Menu** icon.



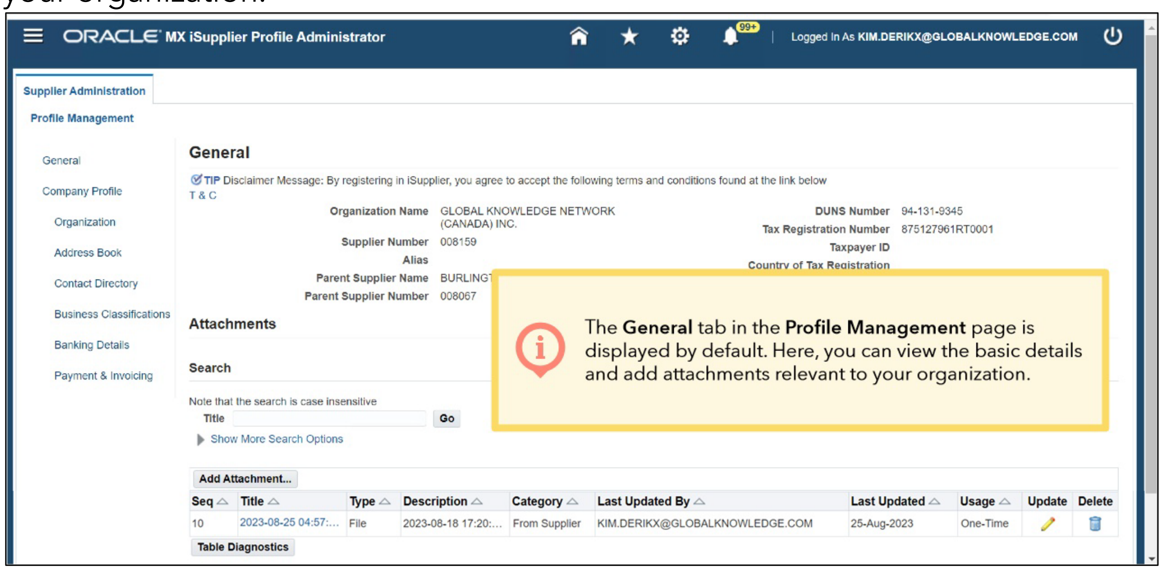
7. Click the **MX iSupplier Profile Administrator** option.



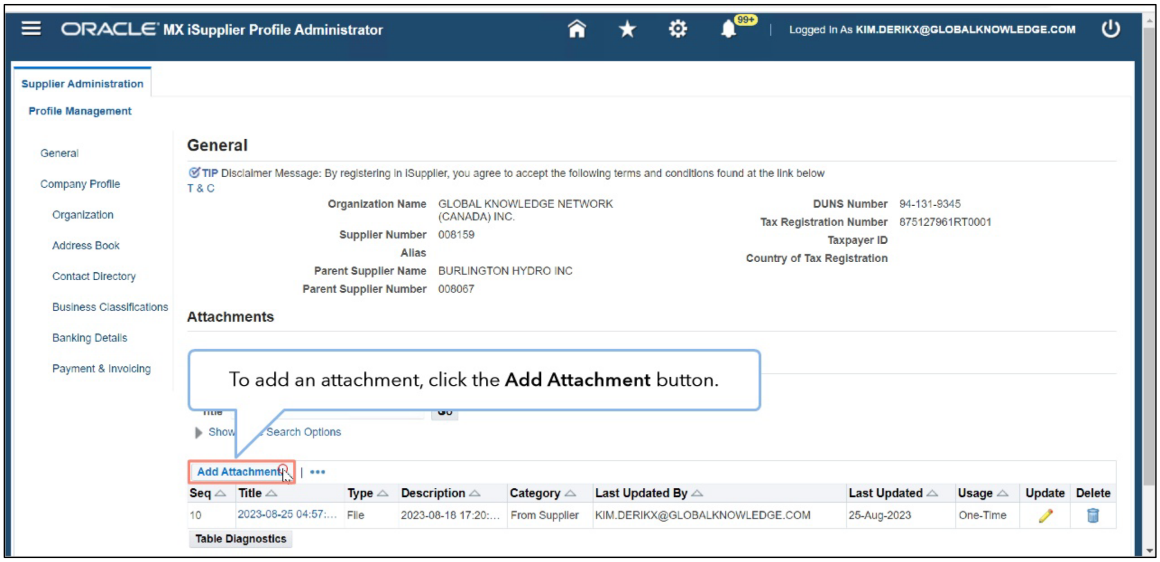
8. Click the **Supplier Details** option.



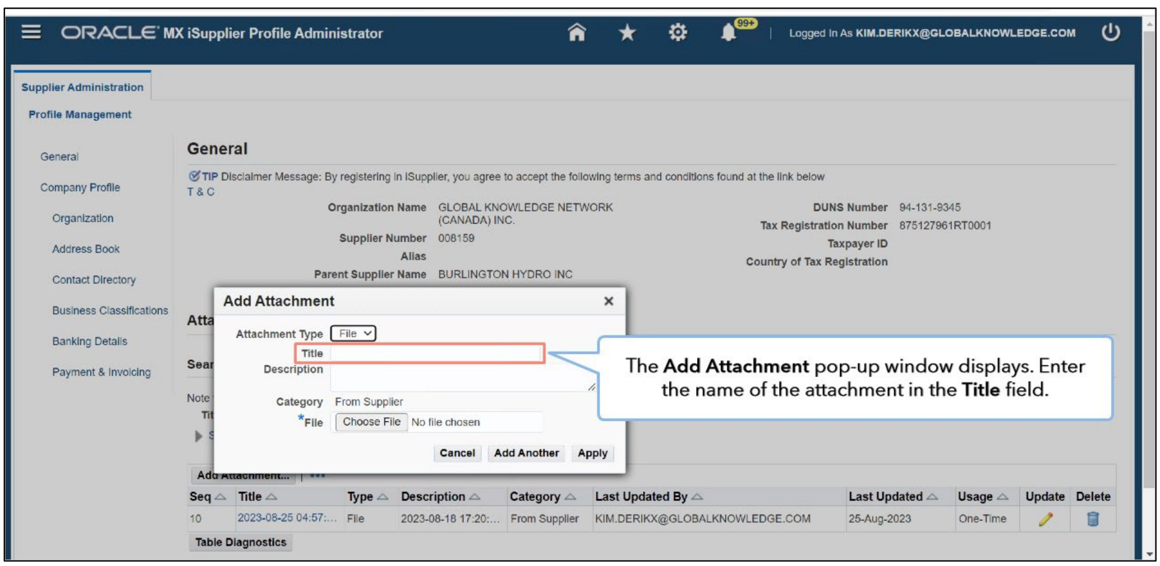
The **General** tab in the **Profile Management** page is displayed by default. Here, you can view the basic details and add attachments relevant to your organization.



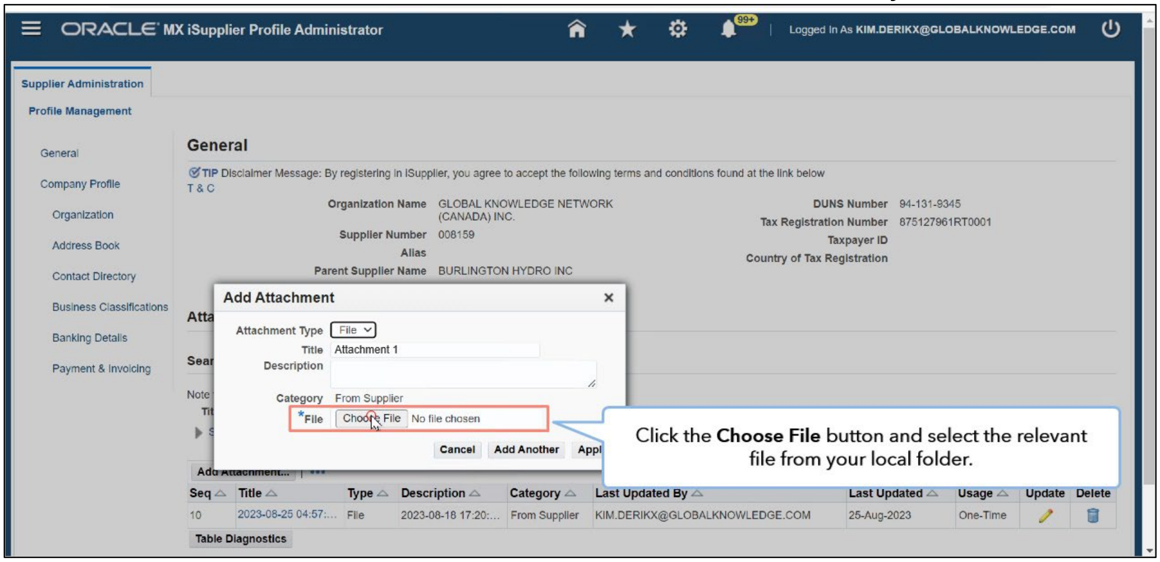
9. To add an attachment, click the **Add Attachment** button.



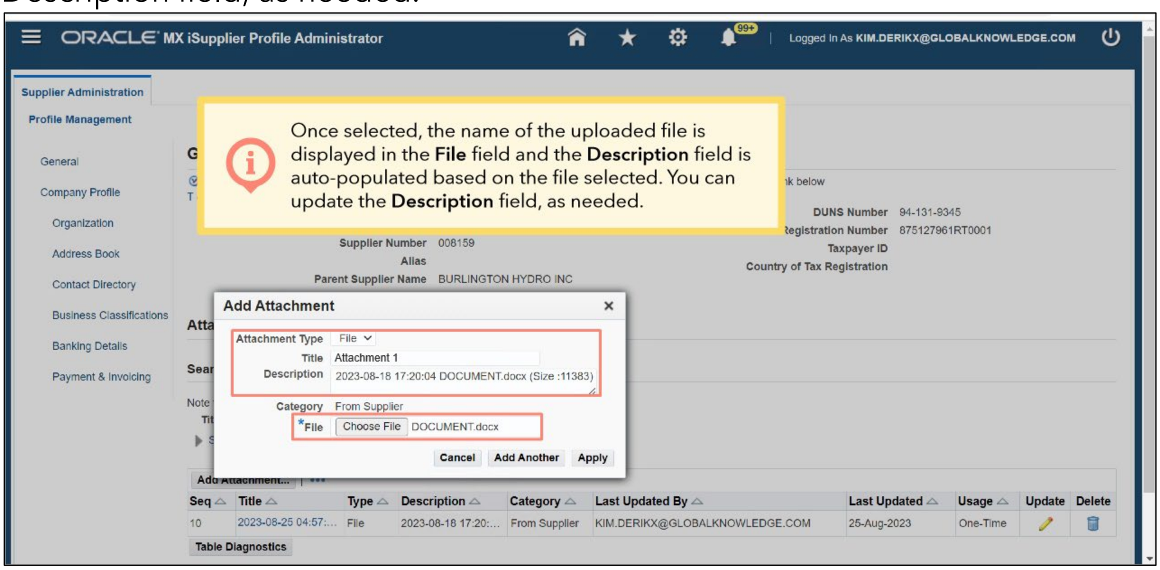
10. The **Add Attachment** pop-up window displays. Enter the name of the attachment in the **Title** field.



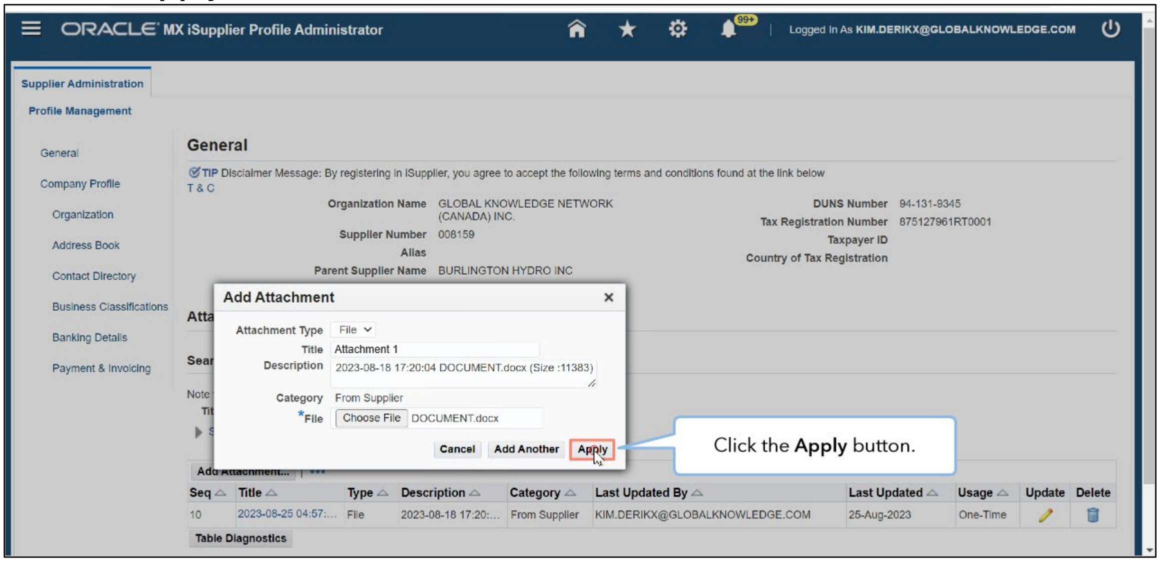
11. Click the **Choose File** button and select the relevant file from your local folder.



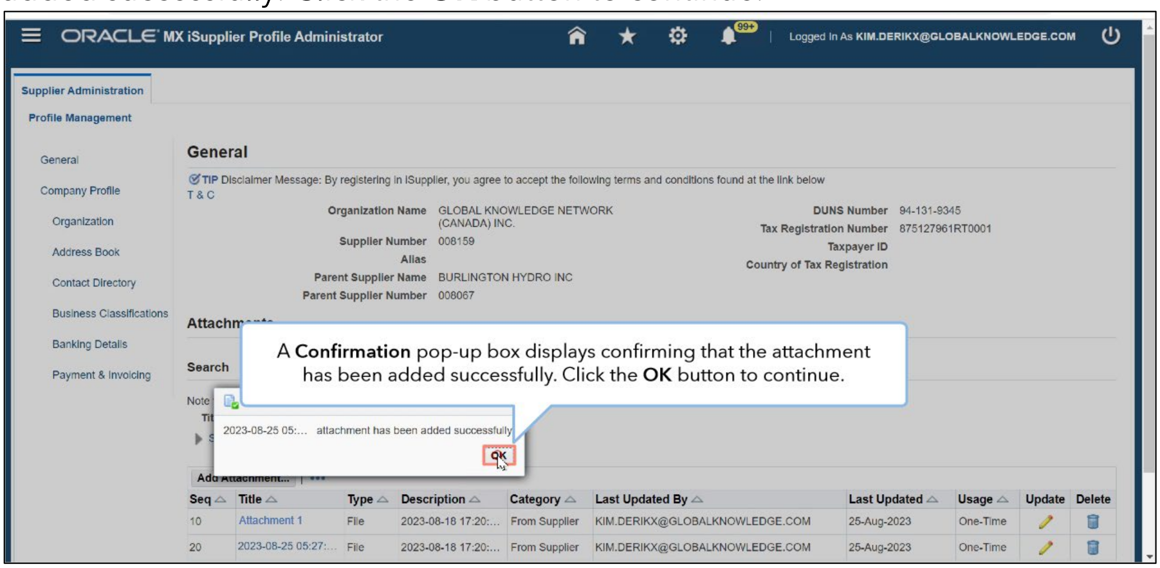
Once selected, the name of the uploaded file is displayed in the File field and the Description field is auto populated based on the file selected. You can update the Description field, as needed.



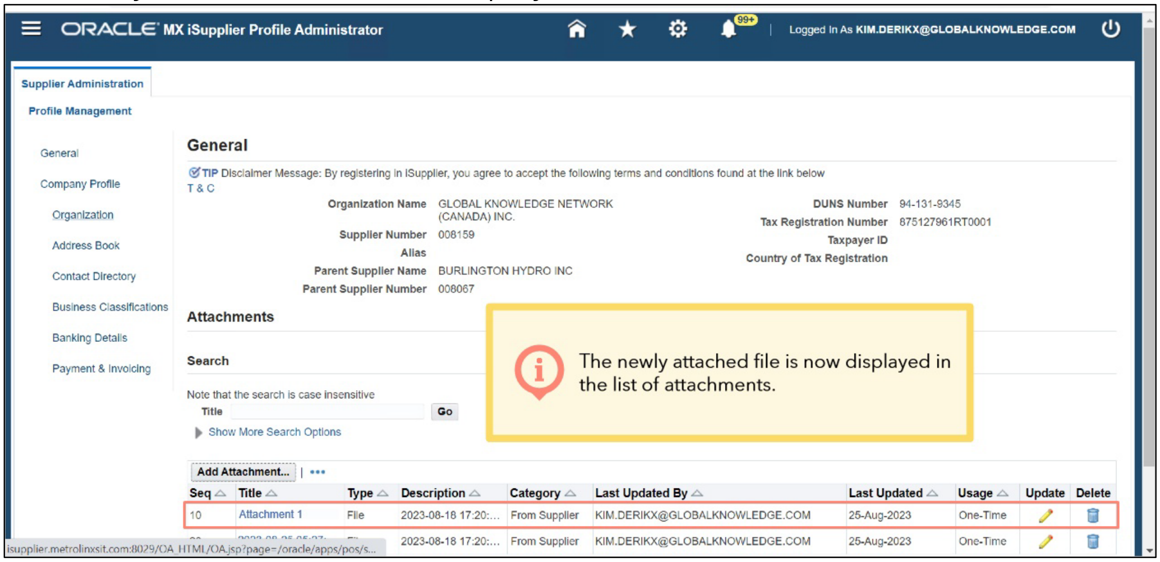
12. Click the **Apply** button.



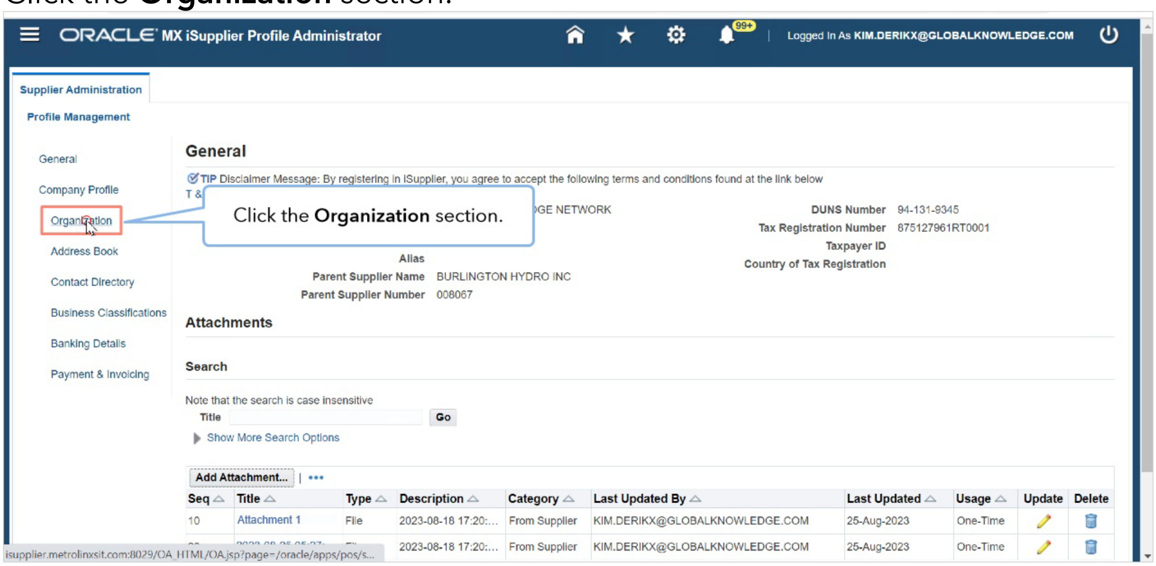
13. A **Confirmation** pop-up box displays confirming that the attachment has been added successfully. Click the **OK** button to continue.



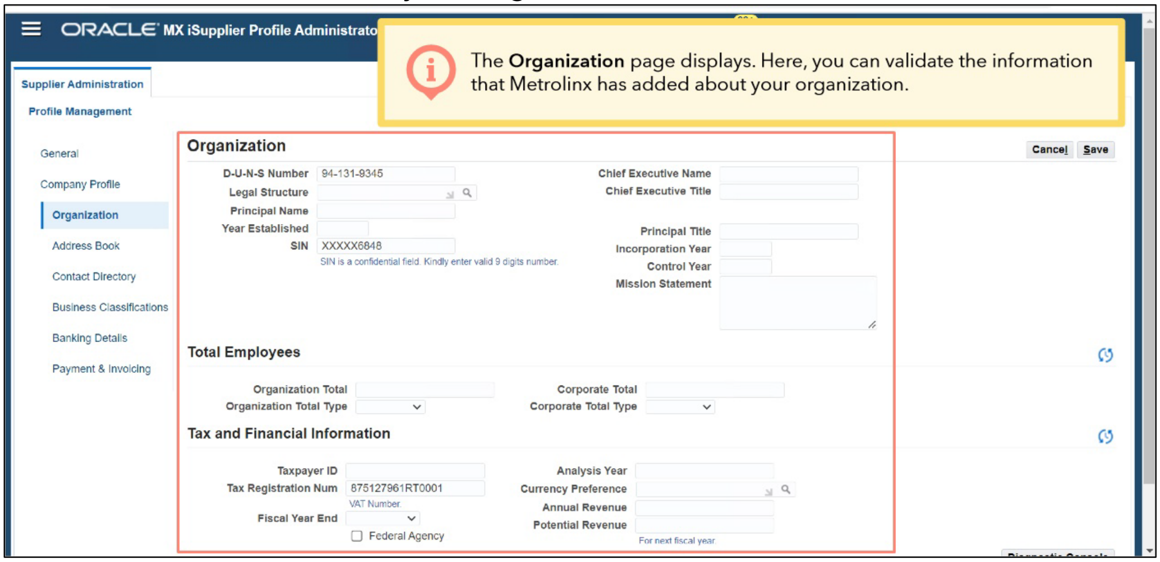
The newly attached file is now displayed in the list of attachments.



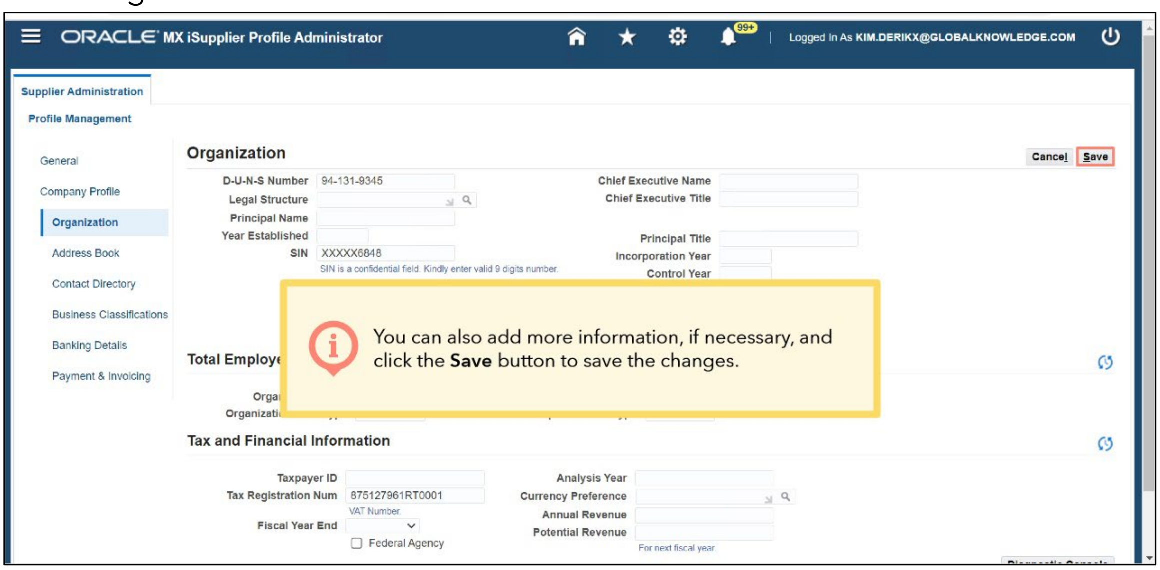
14. Click the **Organization** section.



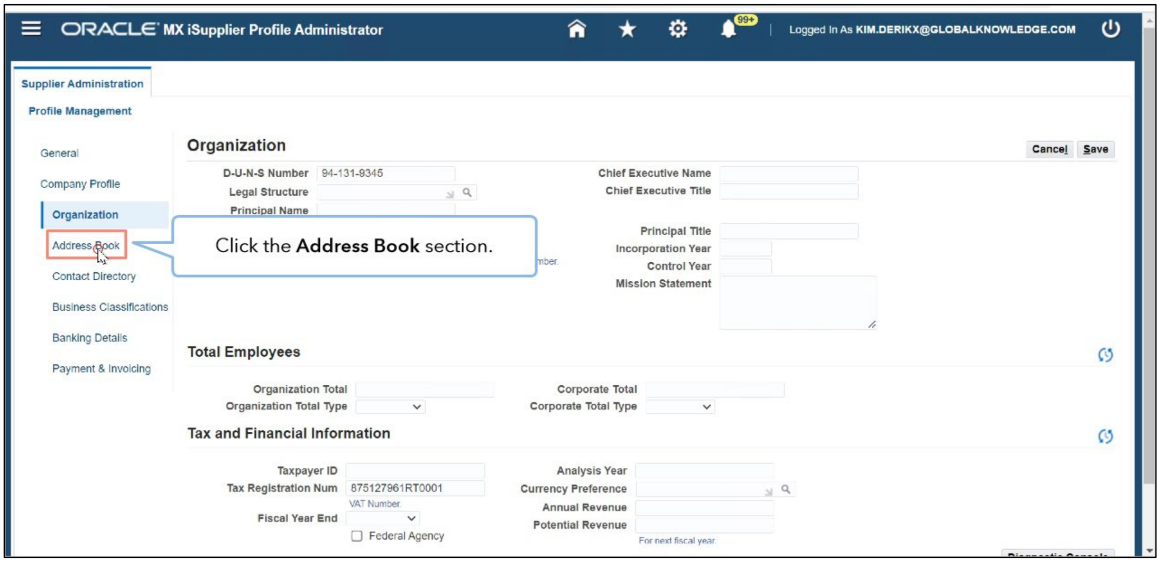
The **Organization** page displays. Here, you can validate the information that Metrolinx has added about your organization.



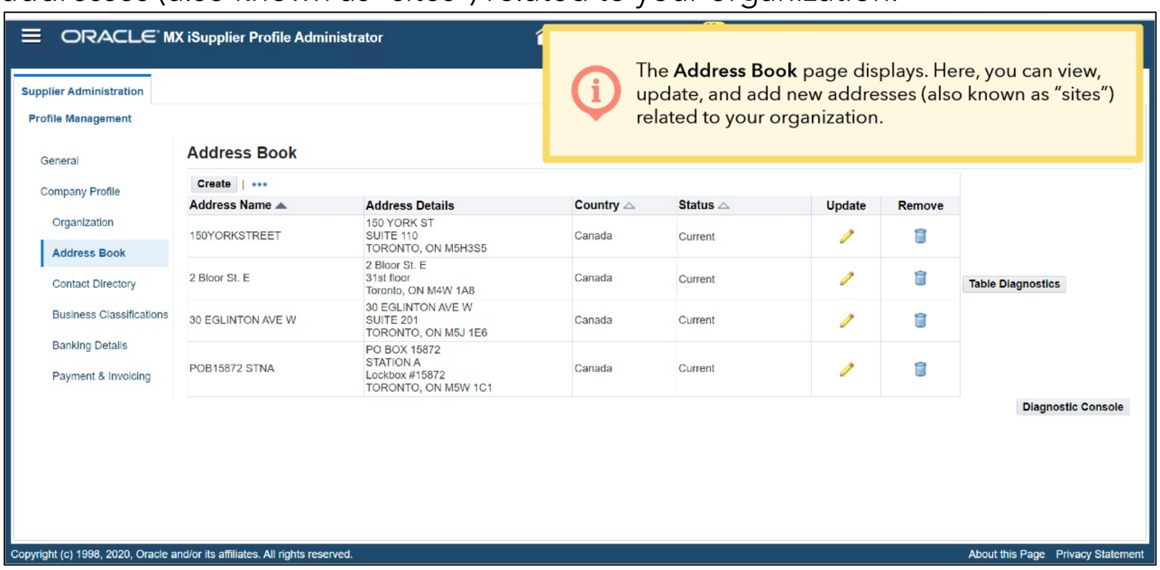
You can also add more information, if necessary, and click the **Save** button to save the changes.



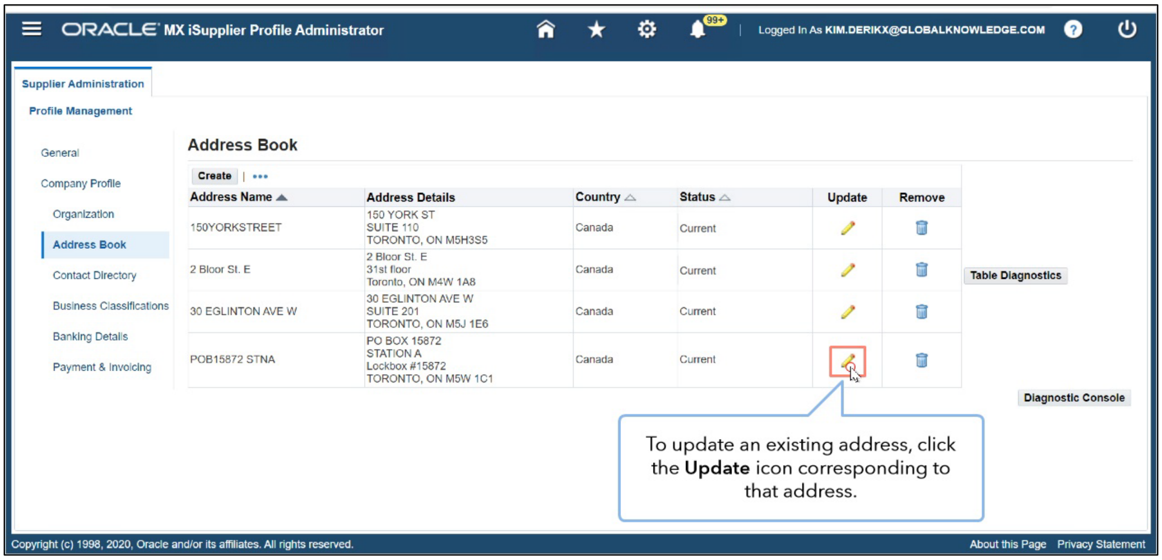
15. Click the **Address Book** section.



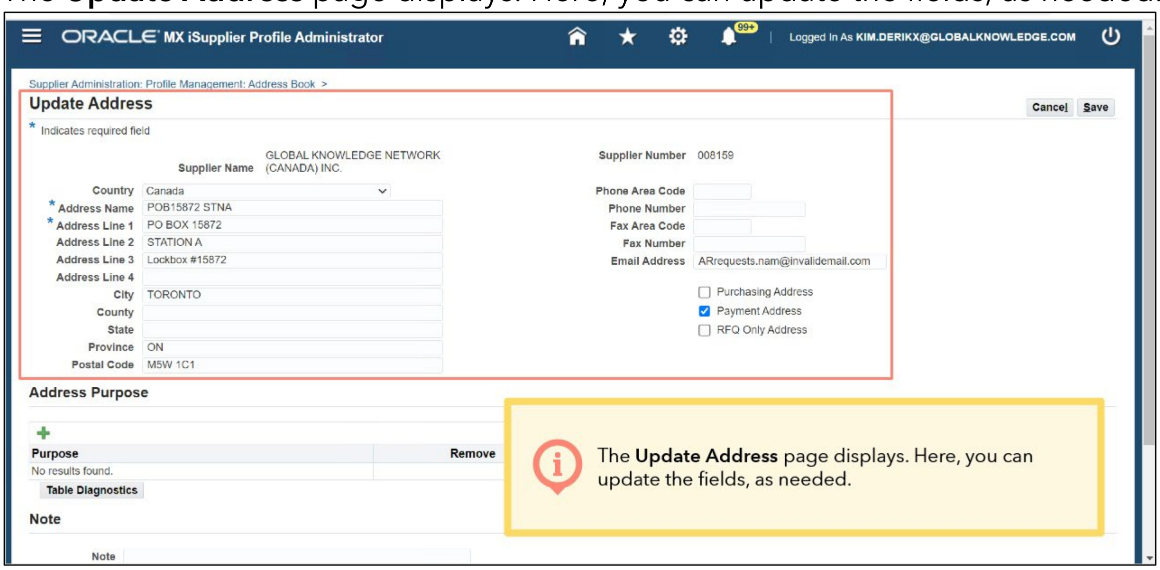
The **Address Book** page displays. Here, you can view, update, and add new addresses (also known as “sites”) related to your organization.



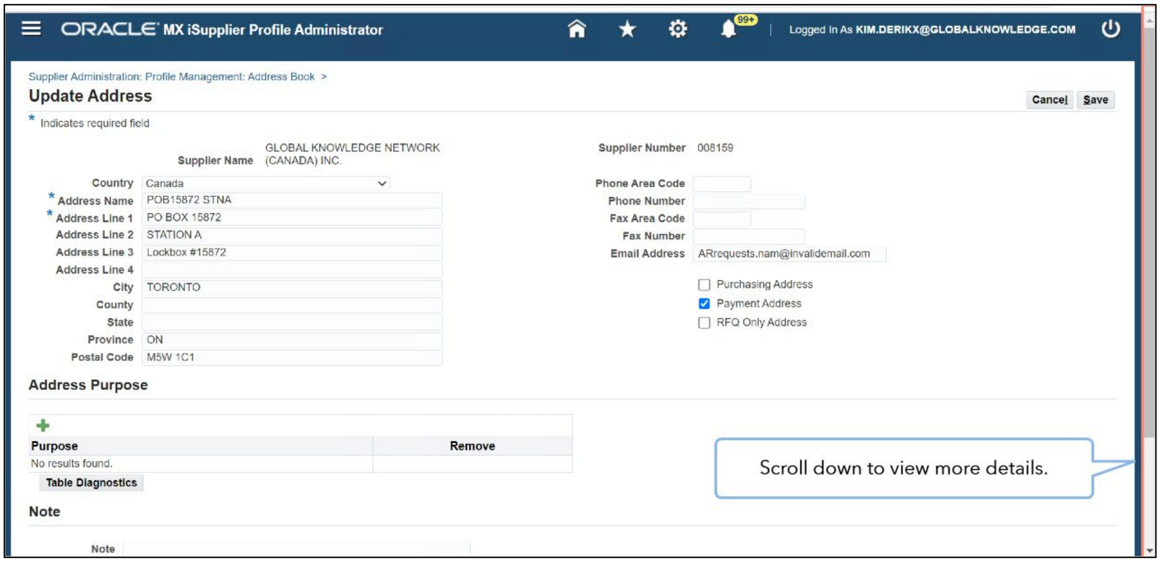
16. To update an existing address, click the **Update** icon corresponding to that address.



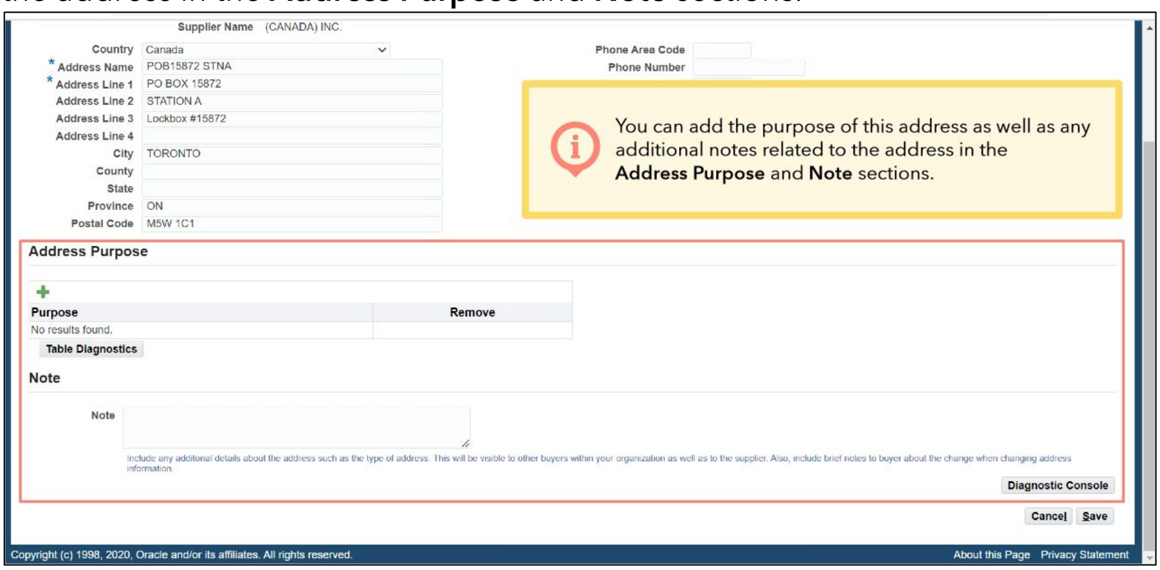
The **Update Address** page displays. Here, you can update the fields, as needed.



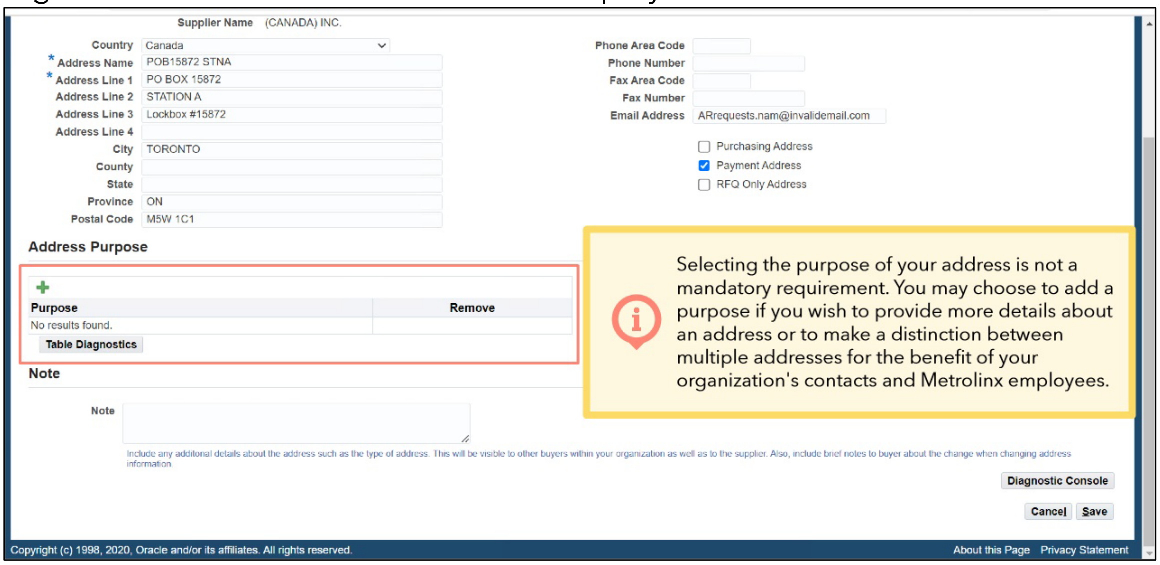
17. Scroll down to view more details.



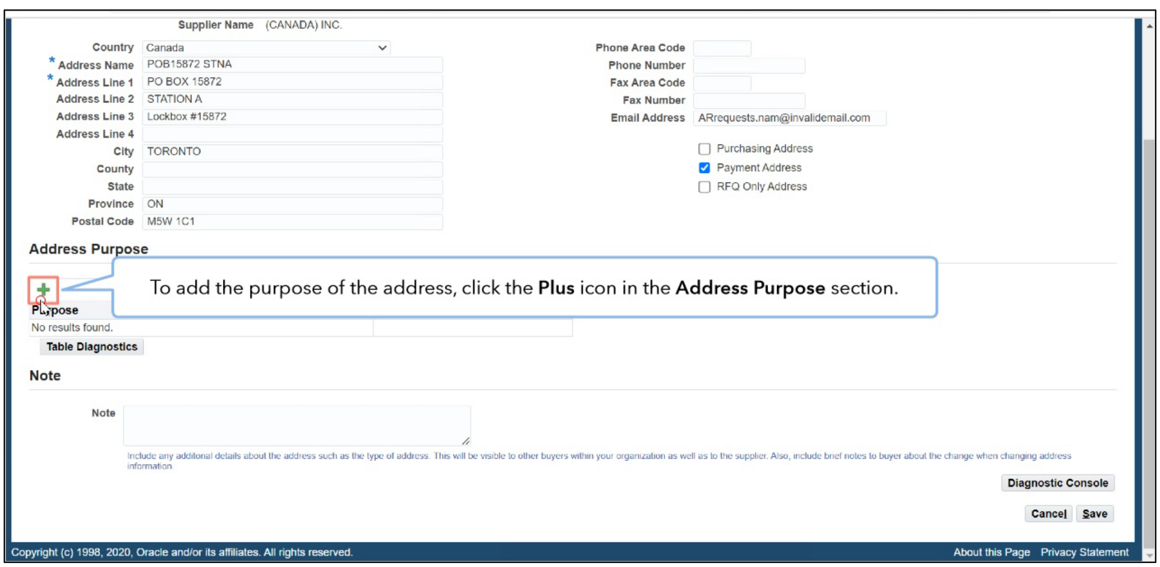
You can add the purpose of this address as well as any additional notes related to the address in the **Address Purpose** and **Note** sections.



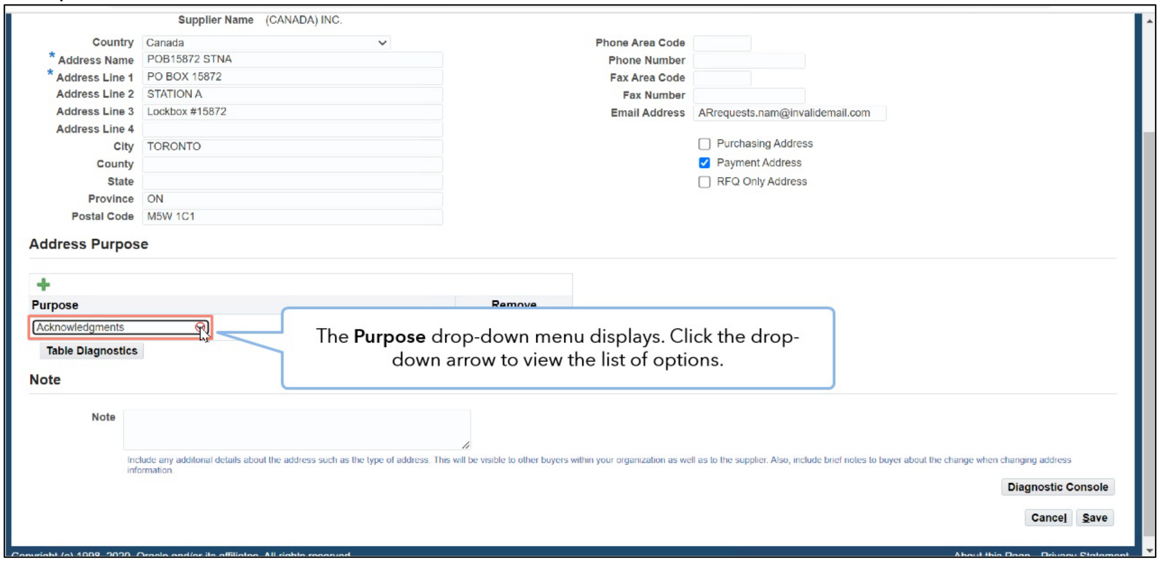
Selecting the purpose of your address is not a mandatory requirement. You may choose to add a purpose if you wish to provide more details about an address or to make a distinction between multiple addresses for the benefit of your organization's contacts and Metrolinx employees.



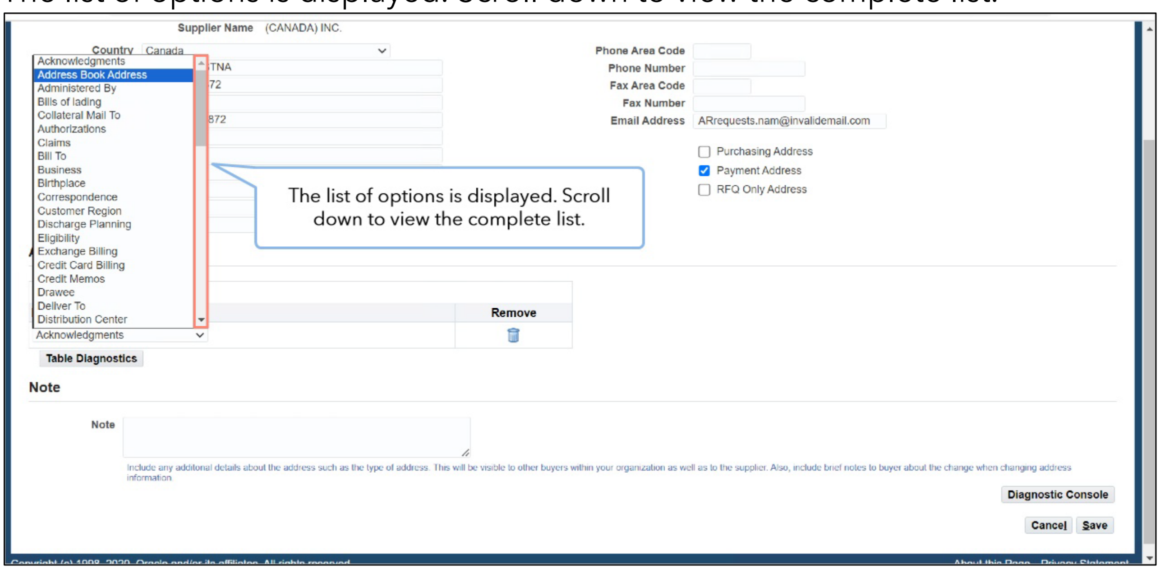
18. To add the purpose of the address, click the **Plus** icon in the **Address Purpose** section.



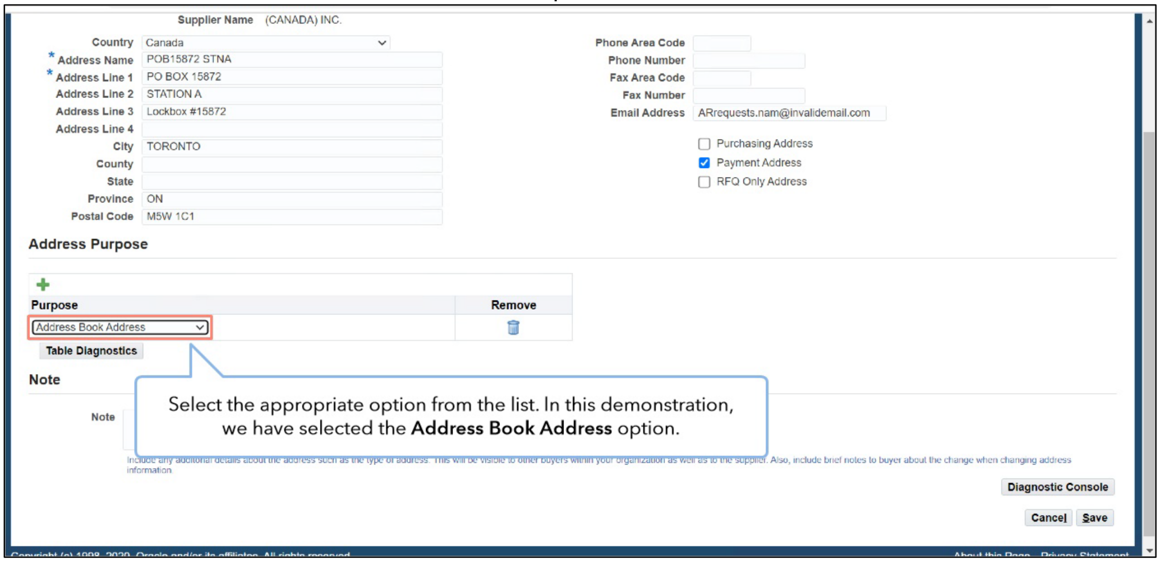
19. The **Purpose** drop-down menu displays. Click the drop-down arrow to view the list of options.



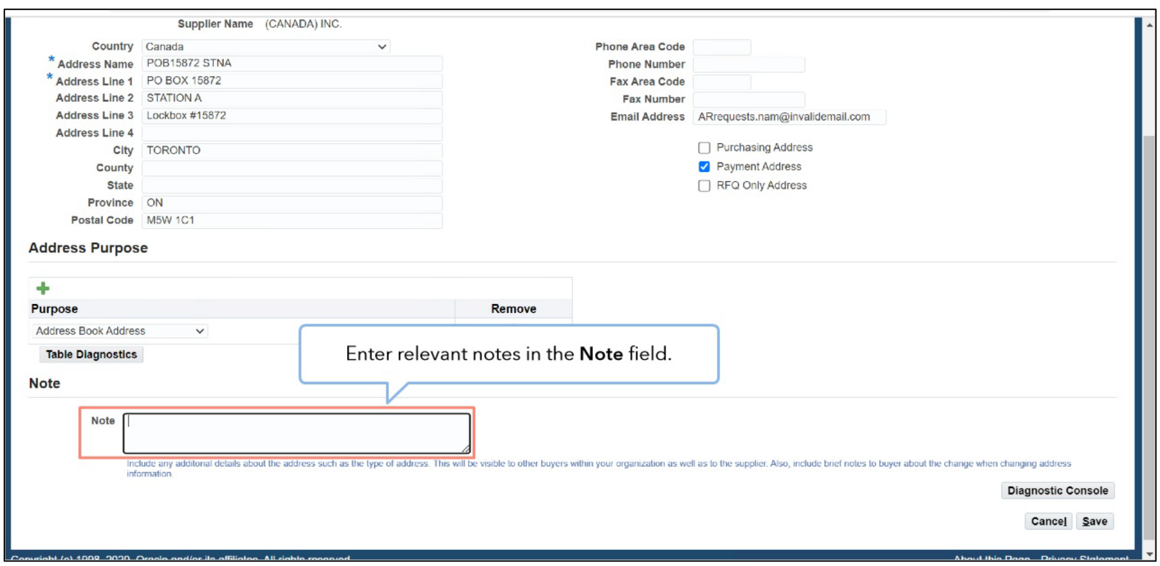
20. The list of options is displayed. Scroll down to view the complete list.



21. Select the appropriate option from the list. In this demonstration, we have selected the **Address Book Address** option.

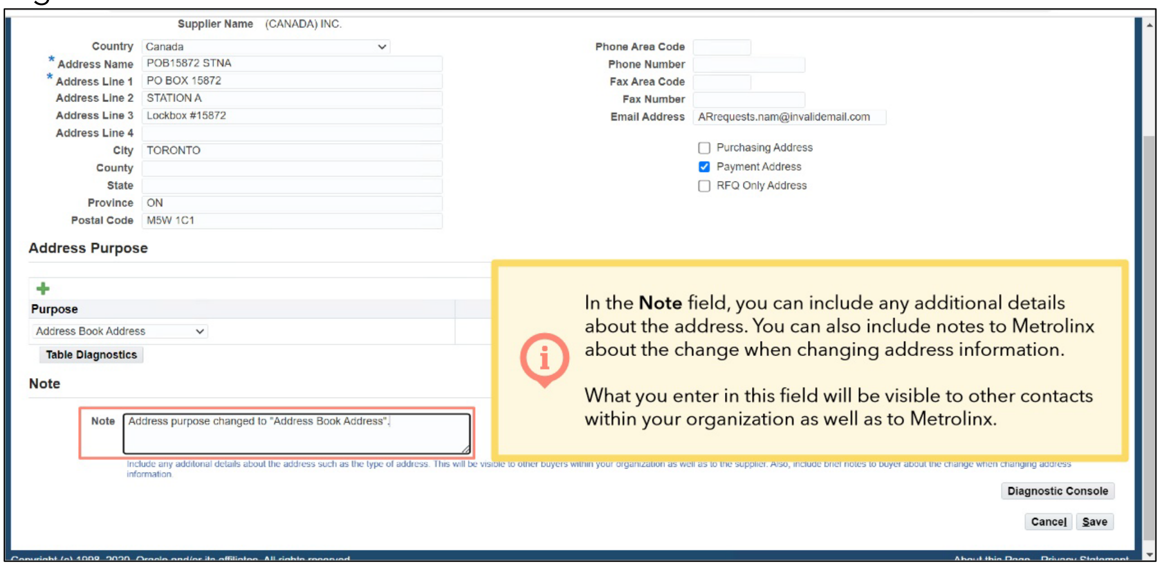


22. Enter relevant notes in the **Note** field.

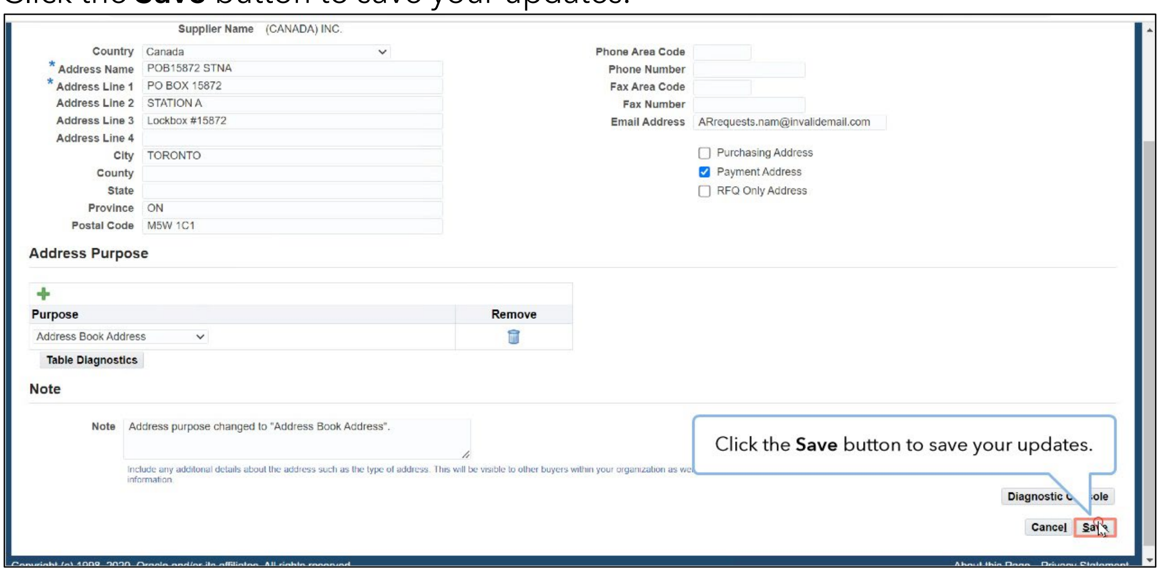


In the **Note** field, you can include any additional details about the address. You can also include notes to Metrolinx about the change when changing address information.

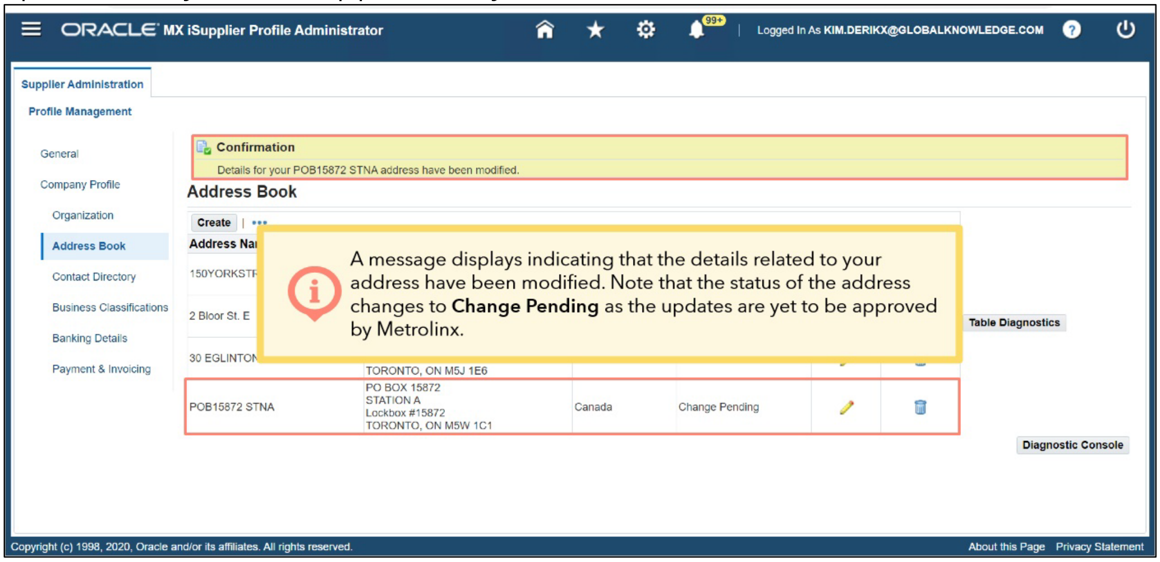
What you enter in this field will be visible to other contacts within your organization as well as to Metrolinx.



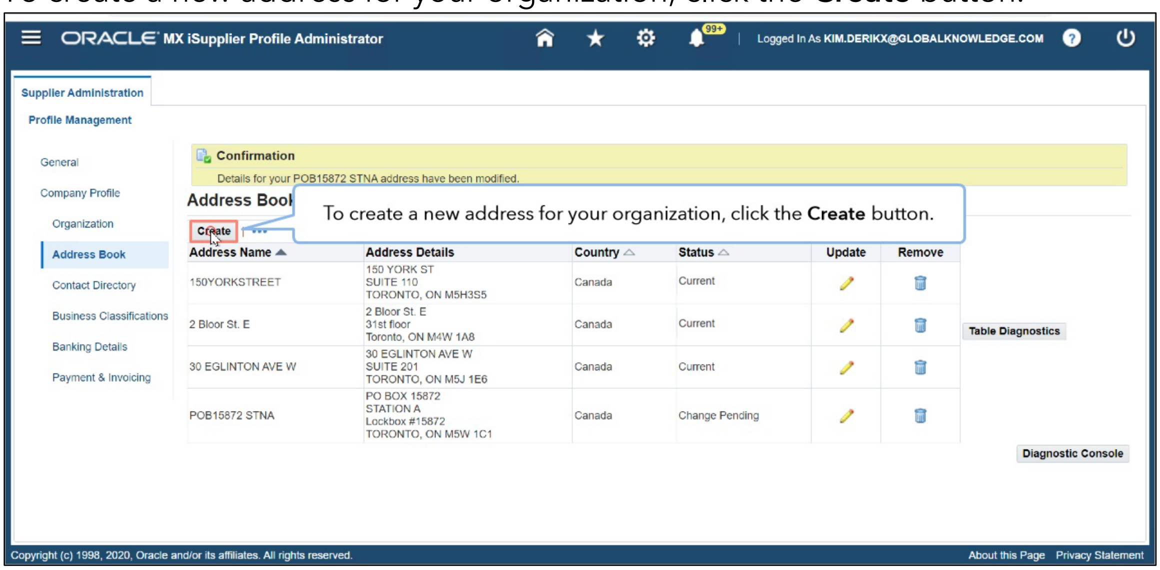
23. Click the **Save** button to save your updates.



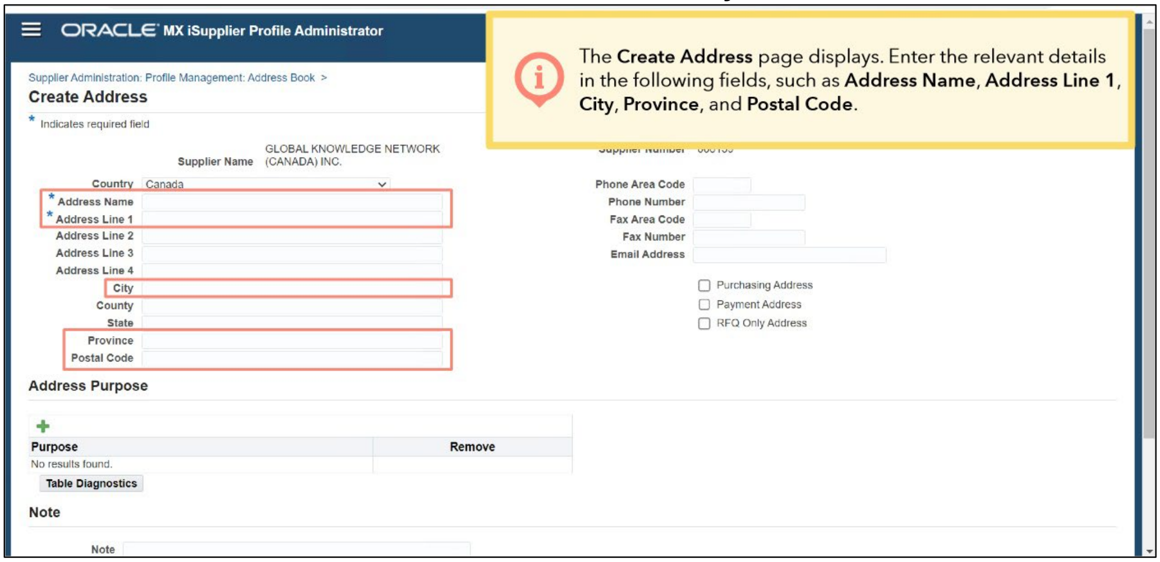
A message displays indicating that the details related to your address have been modified. Note that the status of the address changes to **Change Pending** as the updates are yet to be approved by Metrolinx.



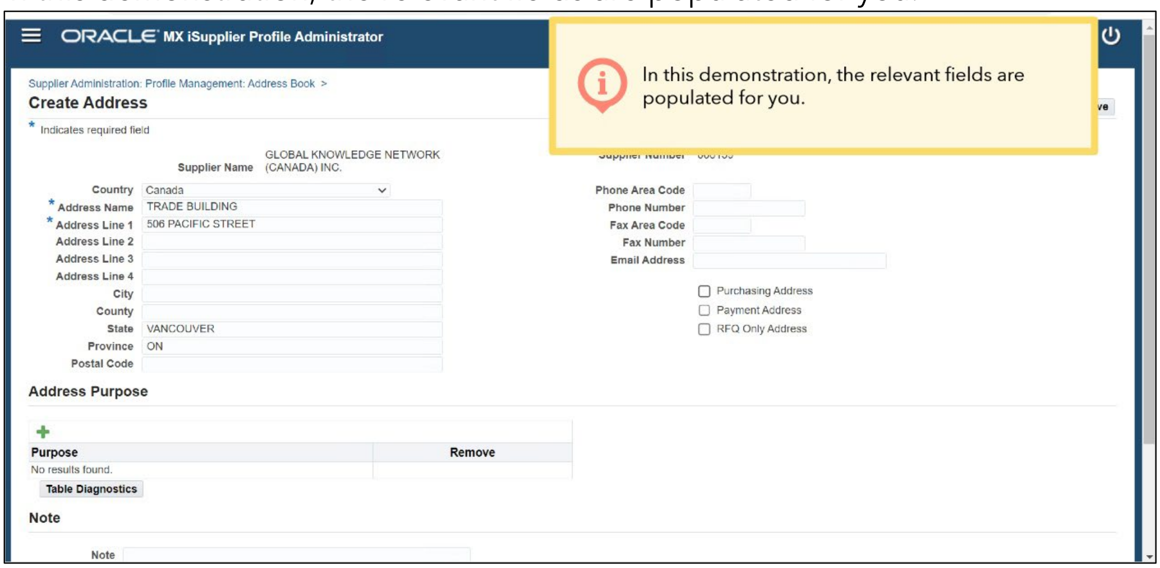
24. To create a new address for your organization, click the **Create** button.



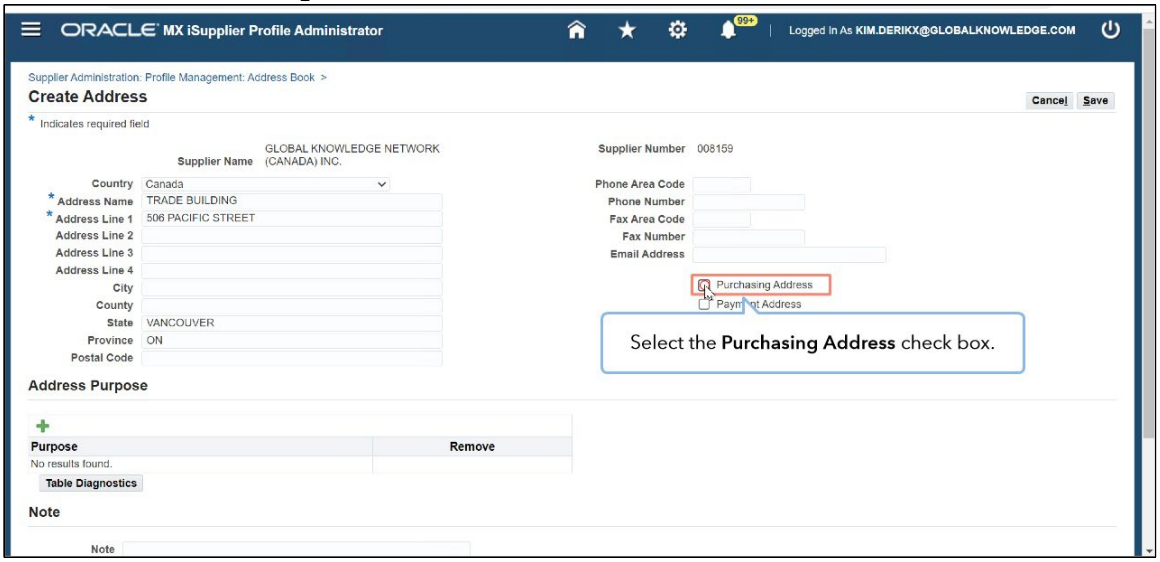
The **Create Address** page displays. Enter the relevant details in the following fields, such as **Address Name**, **Address Line 1**, **City**, **Province**, and **Postal Code**.



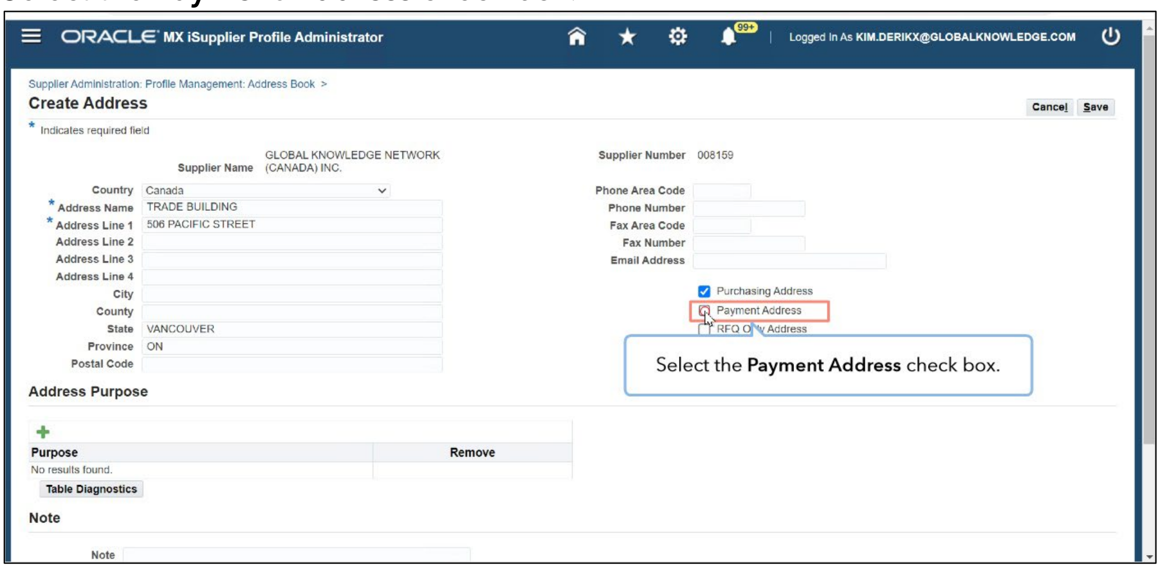
In this demonstration, the relevant fields are populated for you.



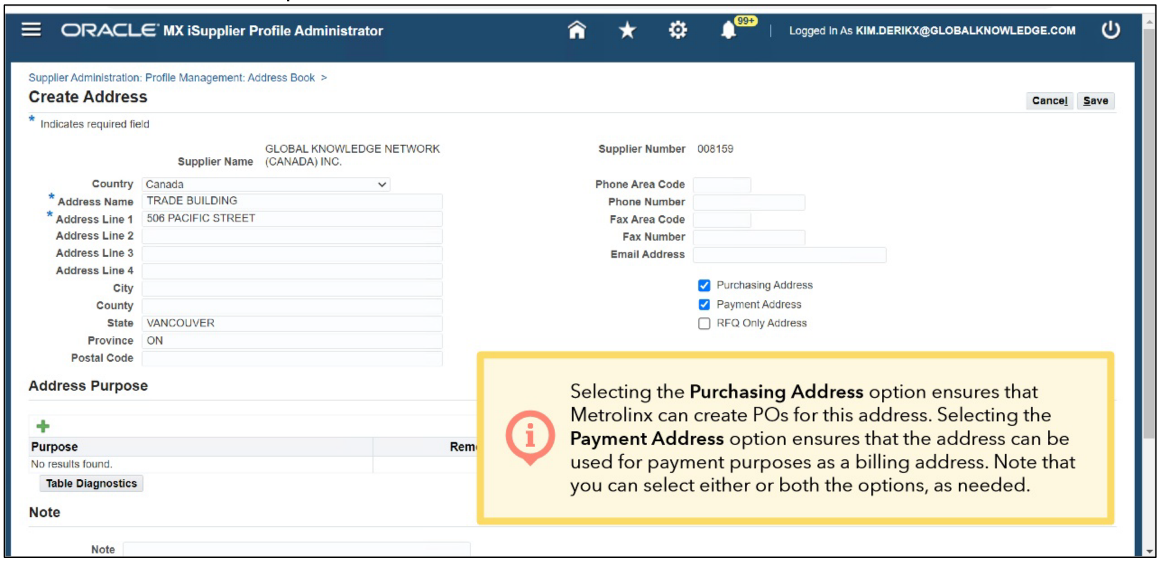
25. Select the **Purchasing Address** check box.



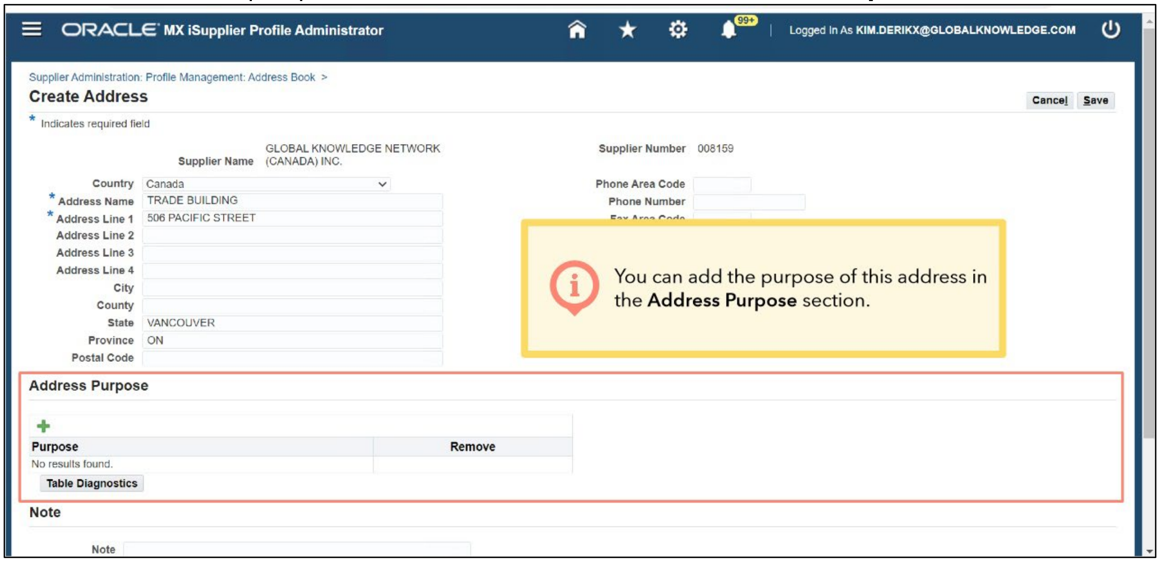
26. Select the **Payment Address** check box.



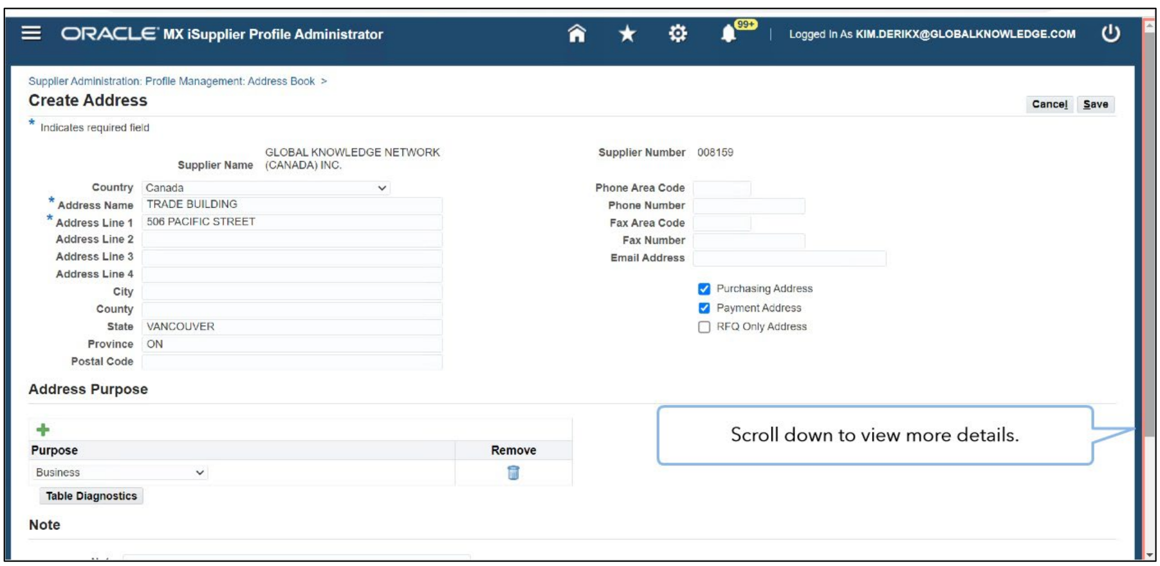
Selecting the **Purchasing Address** option ensures that Metrolinx can create POs for this address. Selecting the **Payment Address** option ensures that the address can be used for payment purposes as a billing address. Note that you can select either or both the options, as needed.



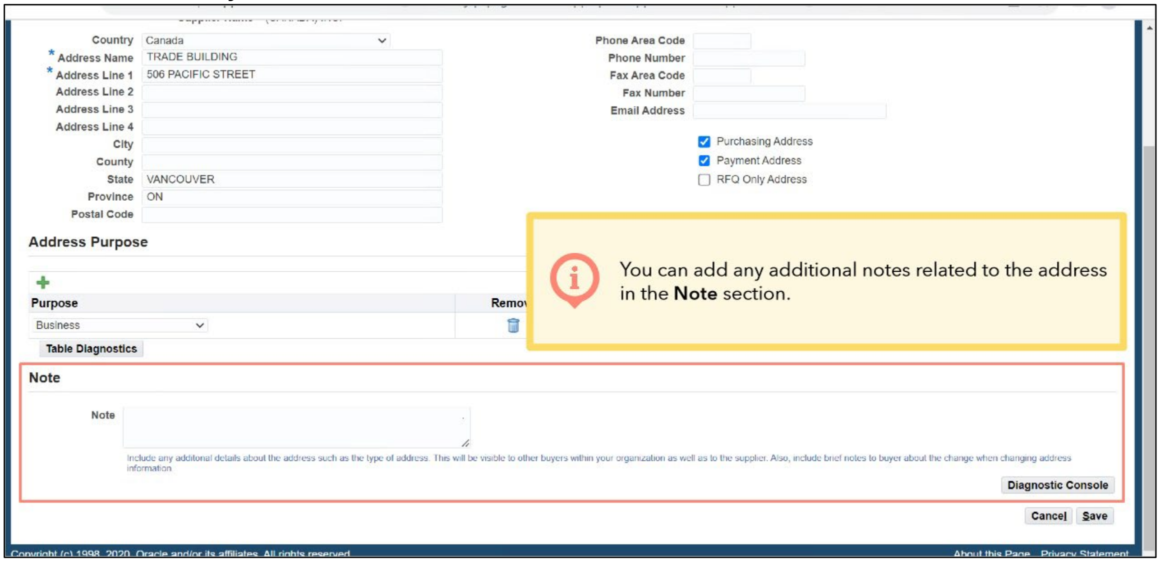
You can add the purpose of this address in the **Address Purpose** section.



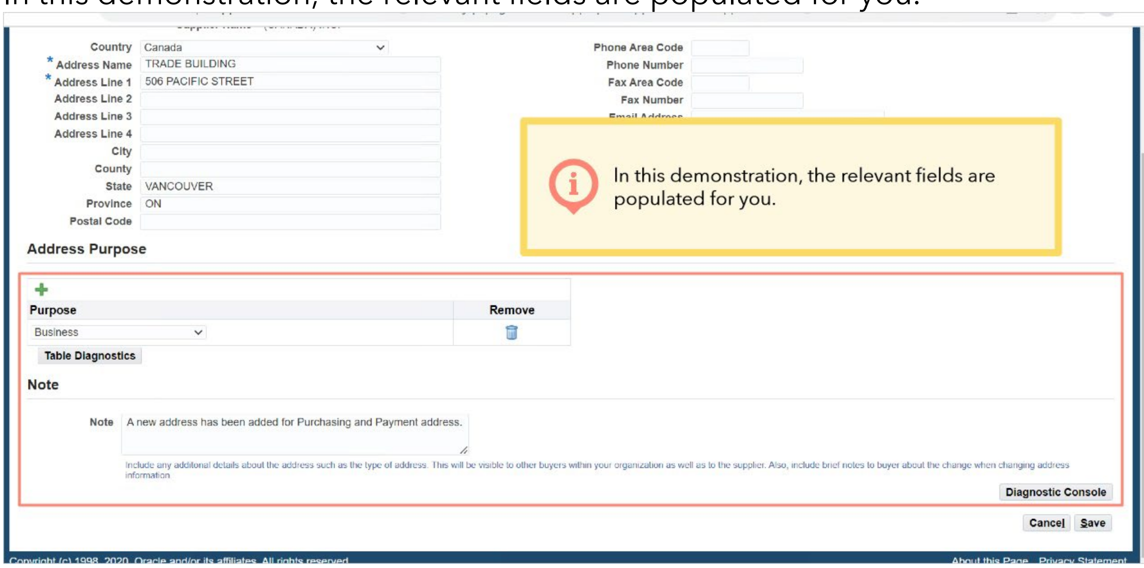
Scroll down to view more details.



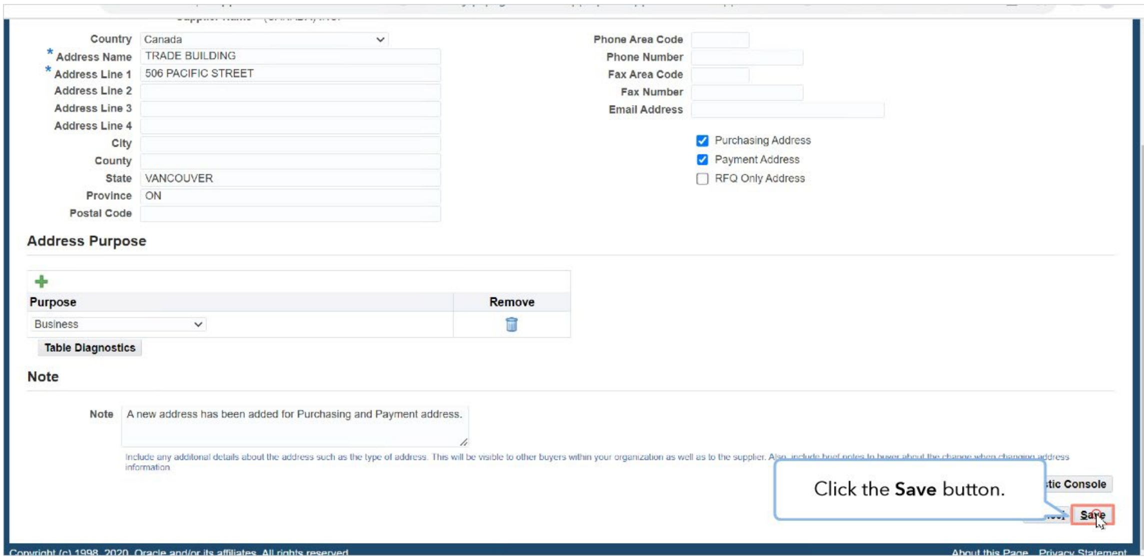
You can add any additional notes related to the address in the **Note** section.



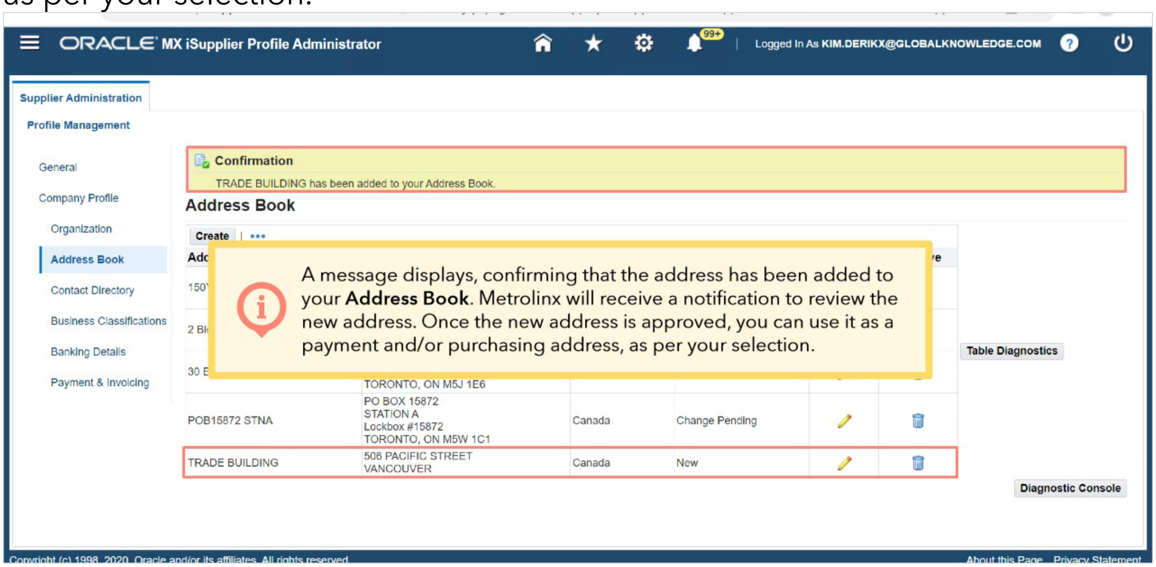
In this demonstration, the relevant fields are populated for you.



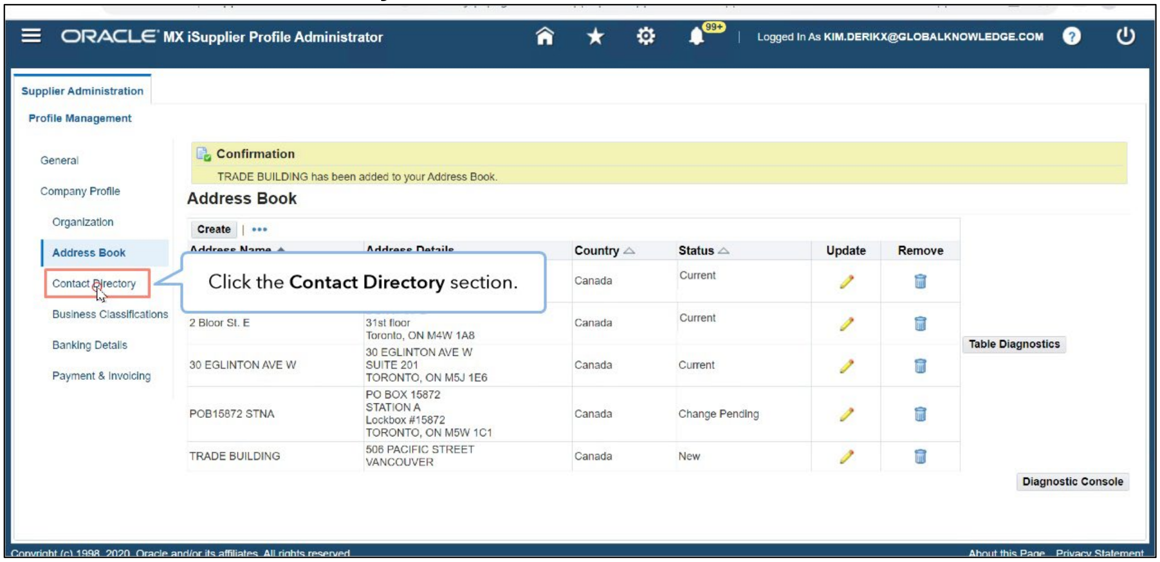
27. Click the **Save** link.



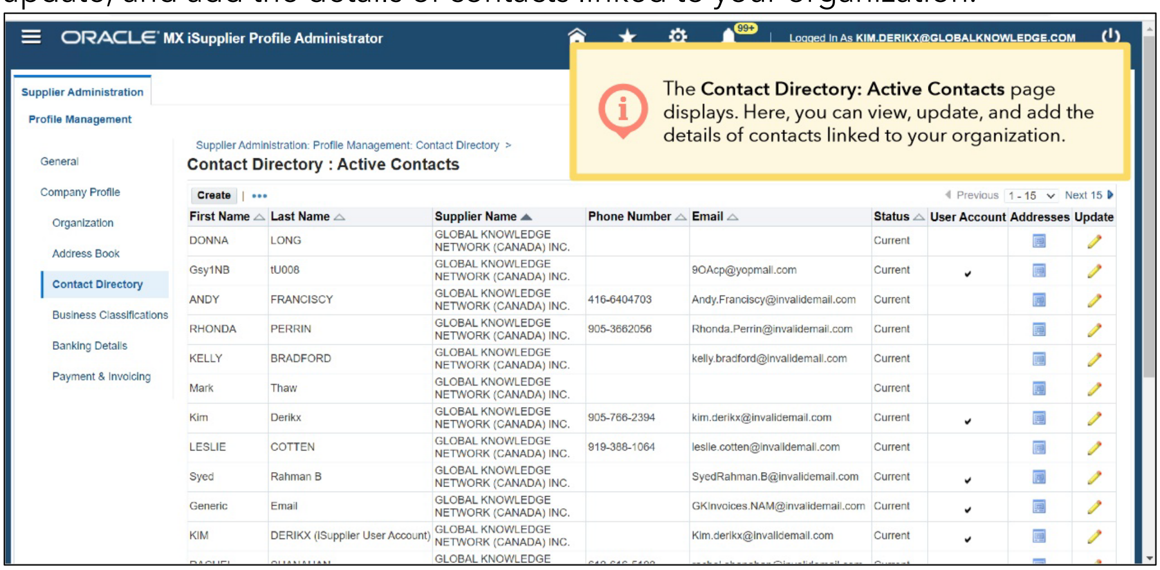
A message displays, confirming that the address has been added to your **Address Book**. Metrolinx will receive a notification to review the new address. Once the new address is approved, you can use it as a payment and/or purchasing address, as per your selection.



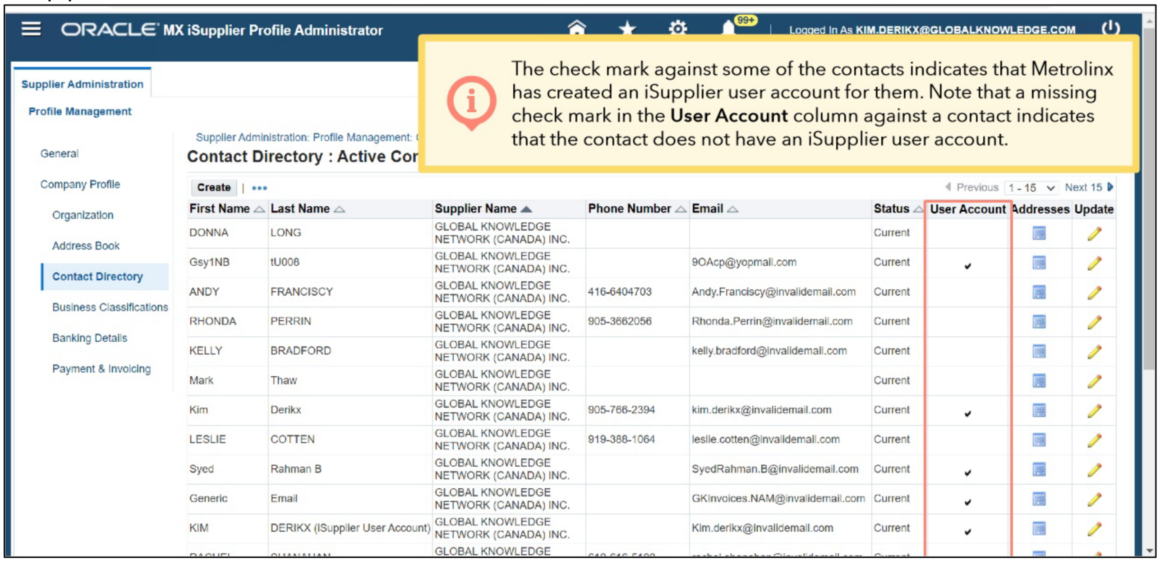
28. Click the **Contact Directory** section.



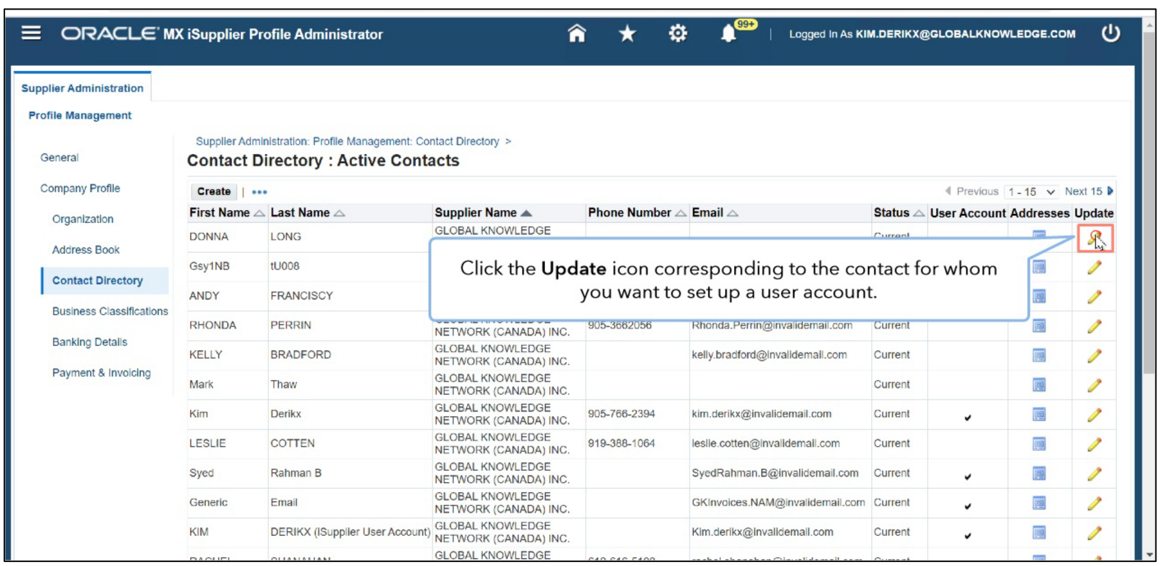
The **Contact Directory: Active Contacts** page displays. Here, you can view, update, and add the details of contacts linked to your organization.



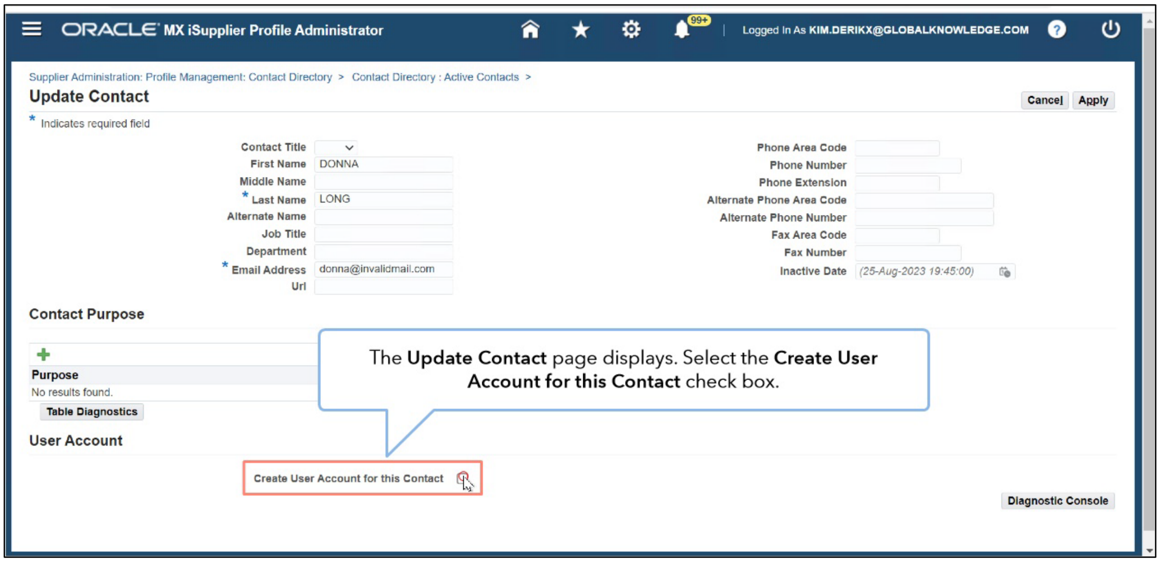
The check mark against some of the contacts indicates that Metrolinx has created an iSupplier user account for them. Note that a missing check mark in the **User Account** column against a contact indicates that the contact does not have an iSupplier user account.



29. Click the **Update** icon corresponding to the contact for whom you want to set up a user account.

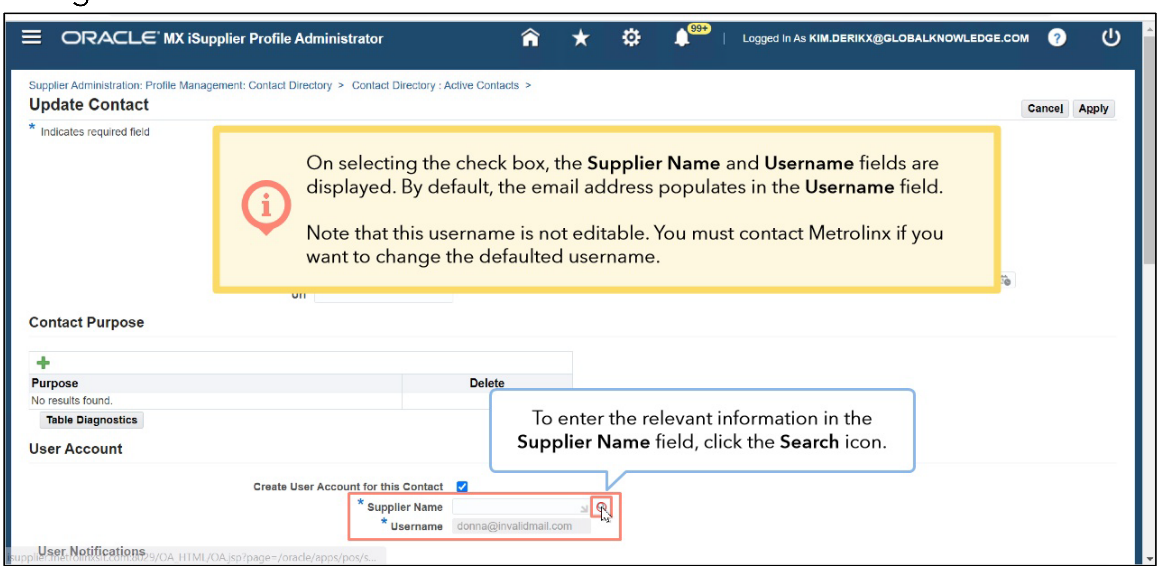


30. The **Update Contact** page displays. Select the **Create User Account for this Contact** check box.

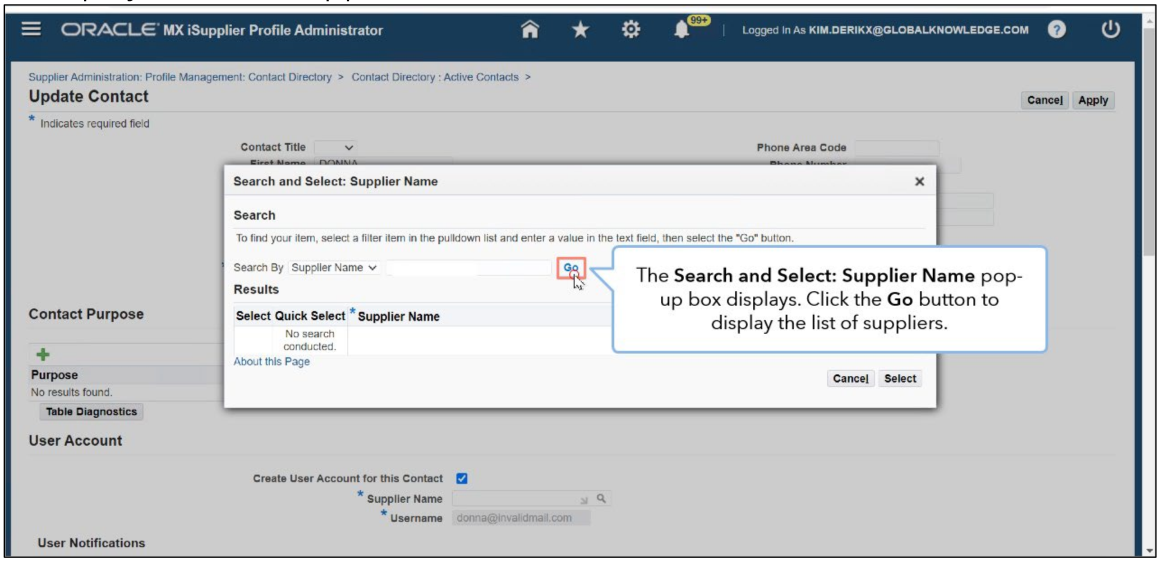


On selecting the check box, the **Supplier Name** and **Username** fields are displayed. By default, the email address populates in the **Username** field.

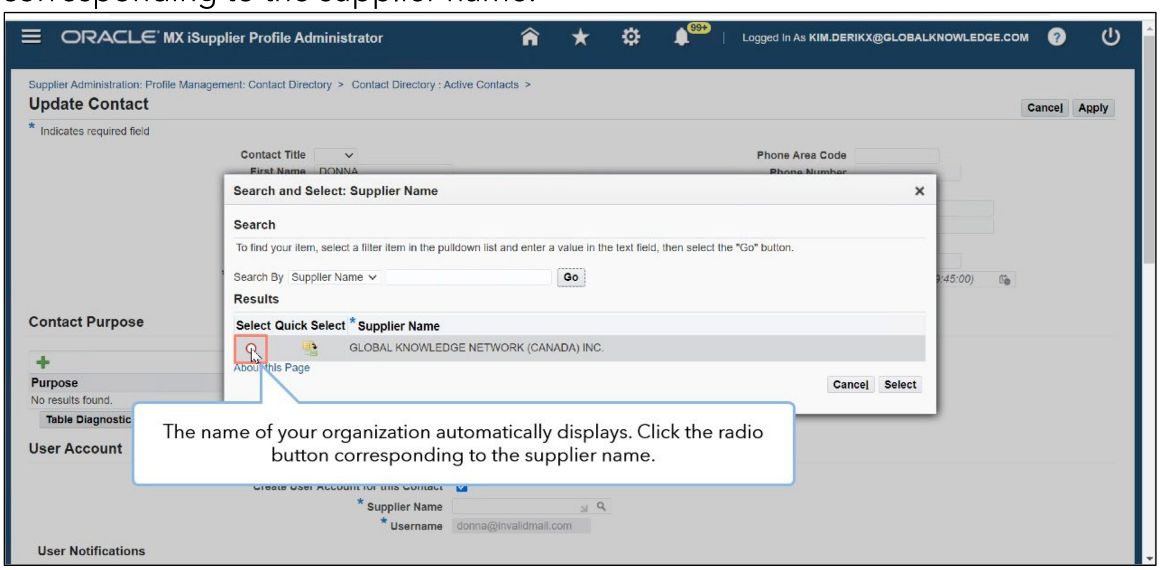
Note: This username is not editable. You must contact Metrolinx if you want to change the defaulted username.



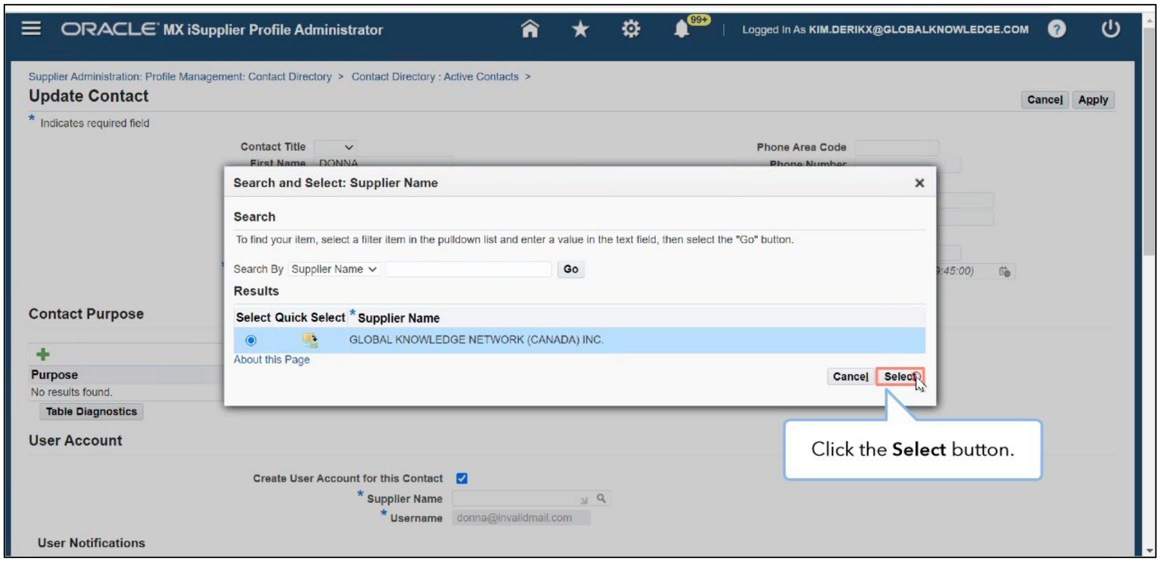
31. The **Search and Select: Supplier Name** pop-up box displays. Click the **Go** button to display the list of suppliers.



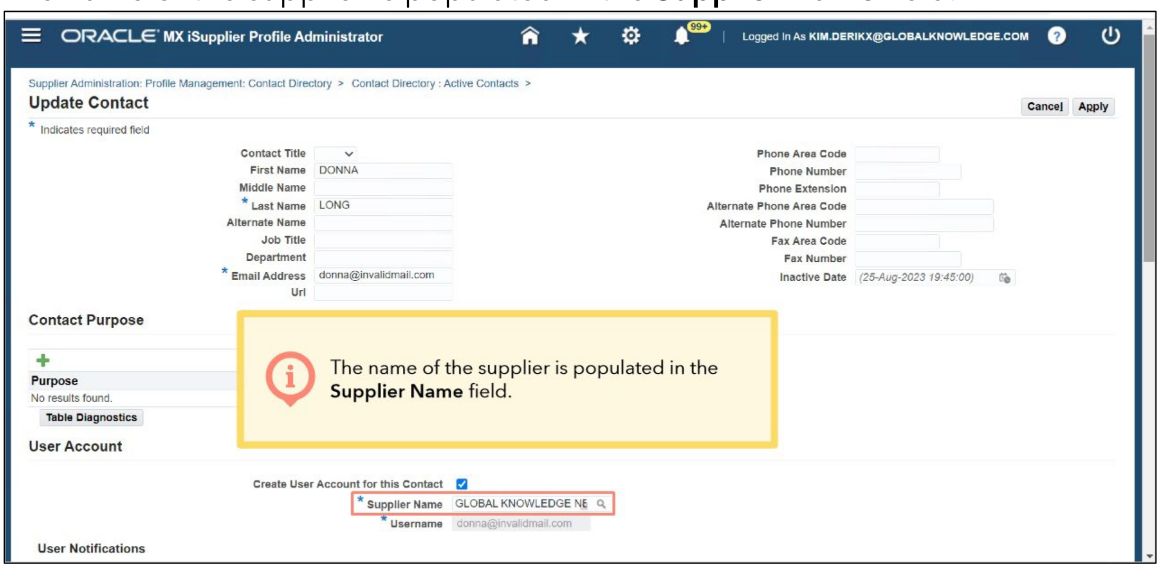
32. The name of your organization automatically displays. Click the radio button corresponding to the supplier name.



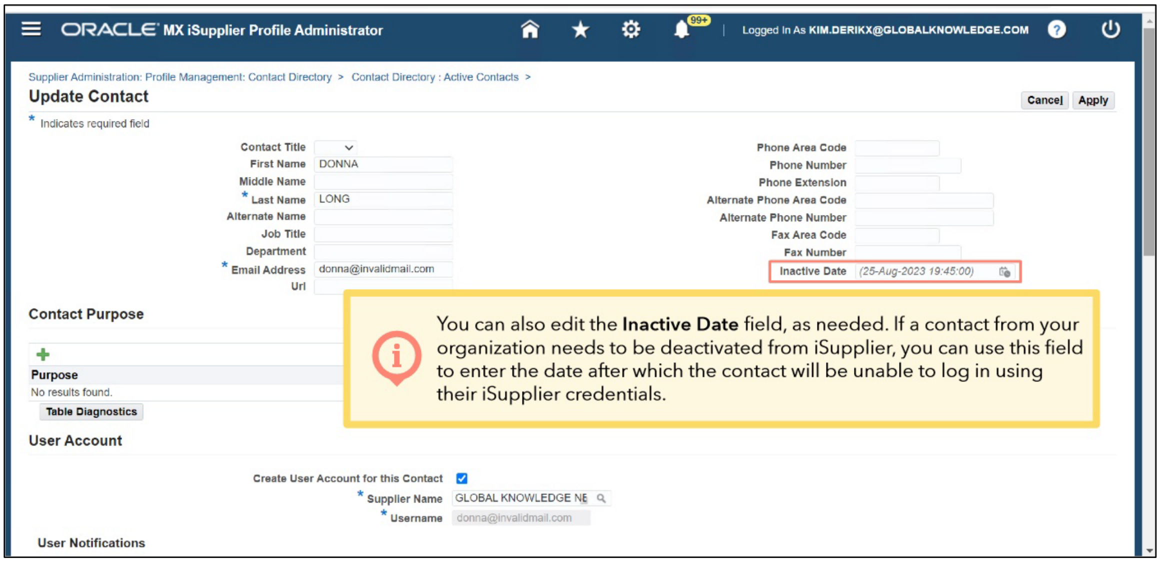
33. Click the **Select** button.



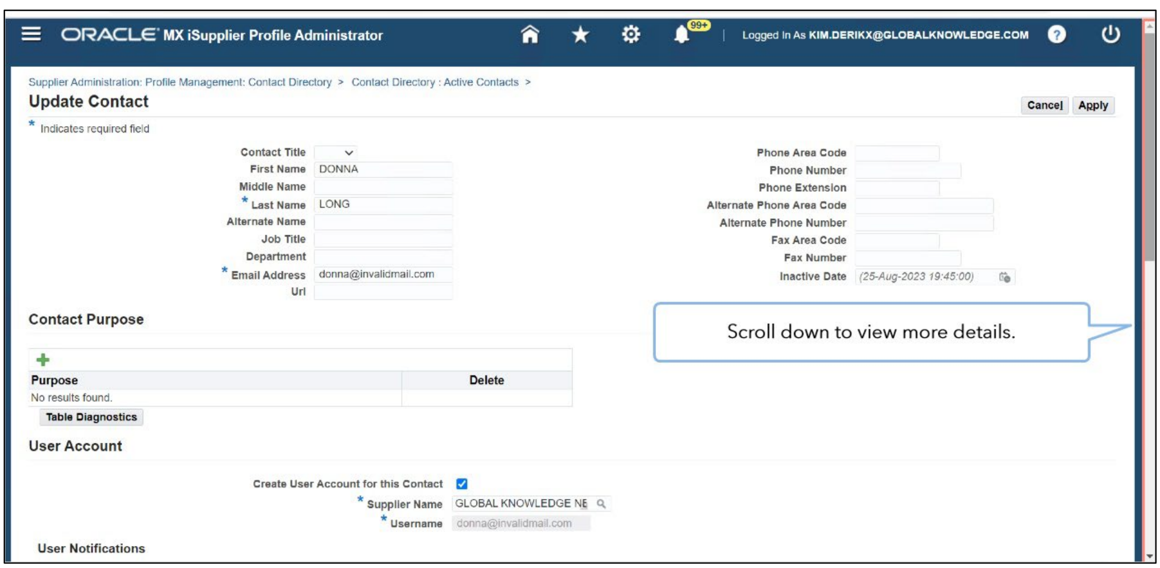
34. The name of the supplier is populated in the **Supplier Name** field.



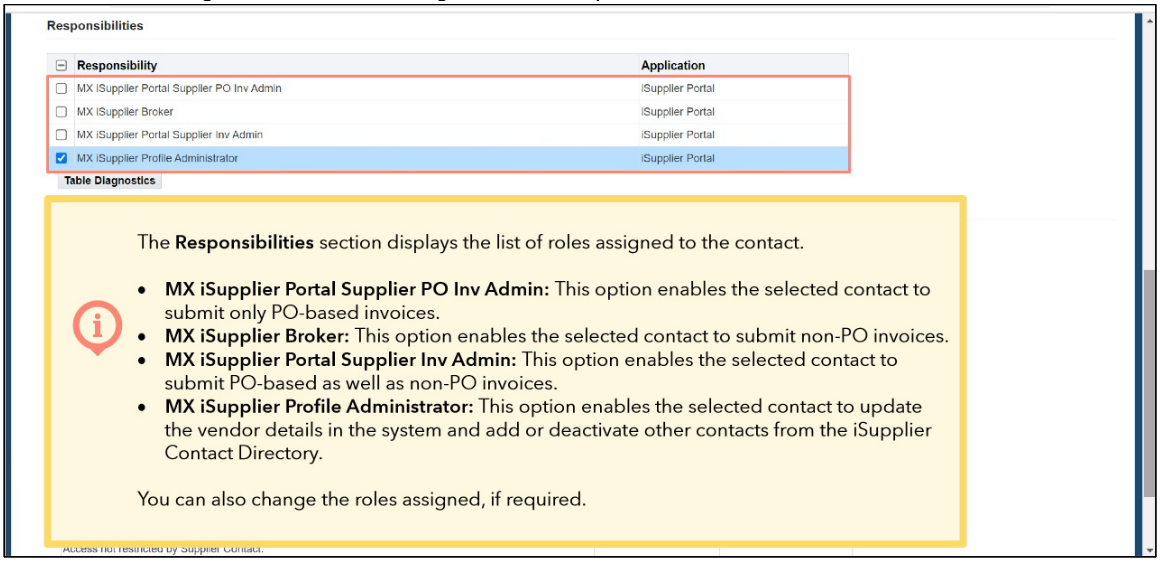
You can also edit the **Inactive Date** field, as needed. If a contact from your organization needs to be deactivated from iSupplier, you can use this field to enter the date after which the contact will be unable to log in using their iSupplier credentials.



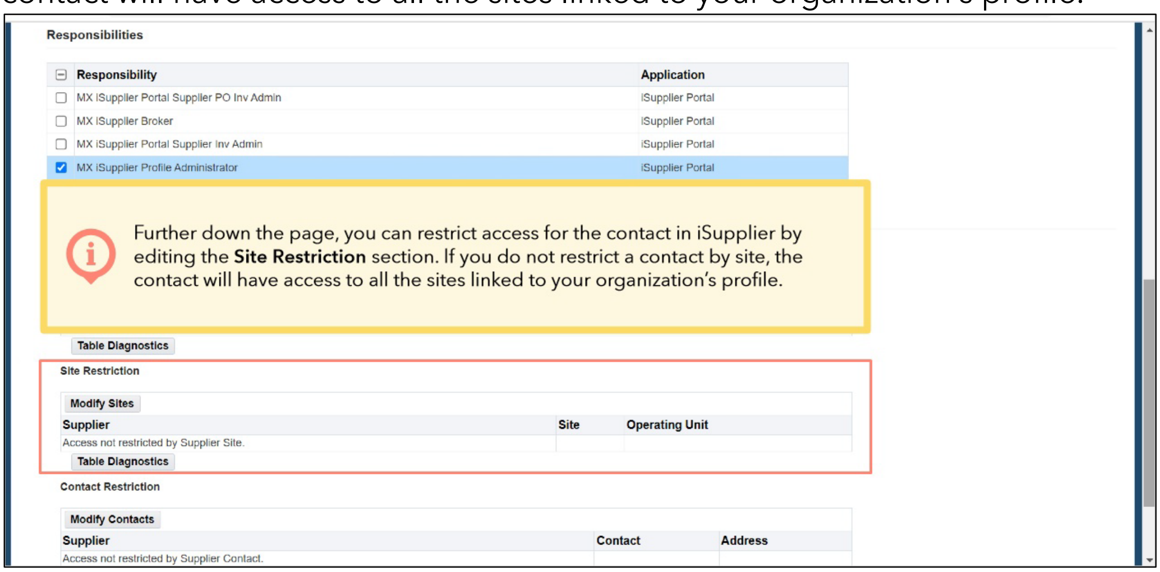
35. Scroll down to view more details.



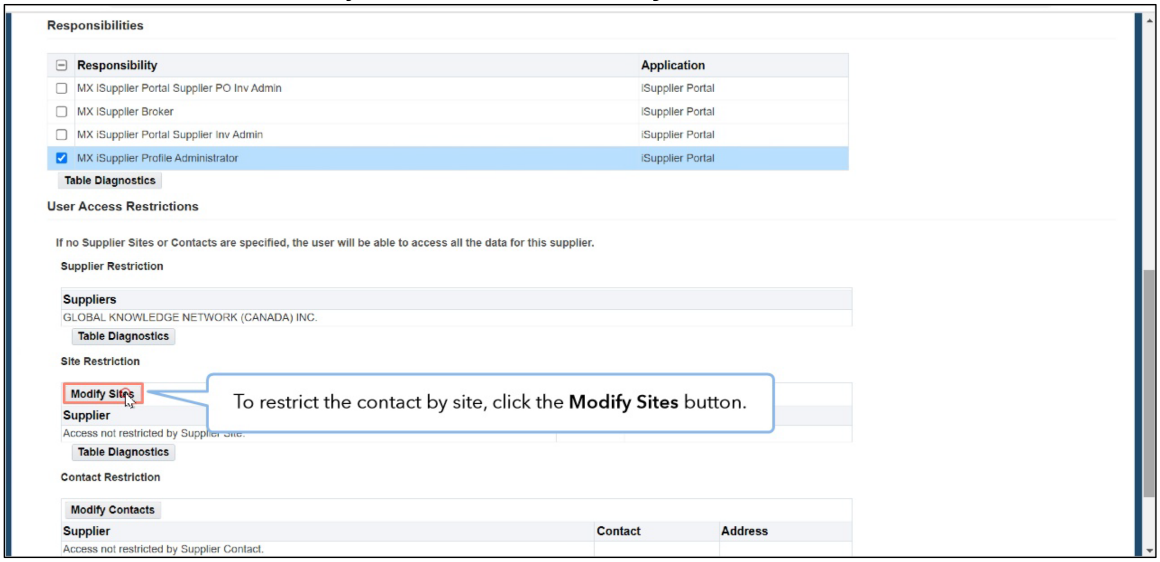
The **Responsibilities** section displays the list of roles assigned to the contact. You can also change the roles assigned, if required.



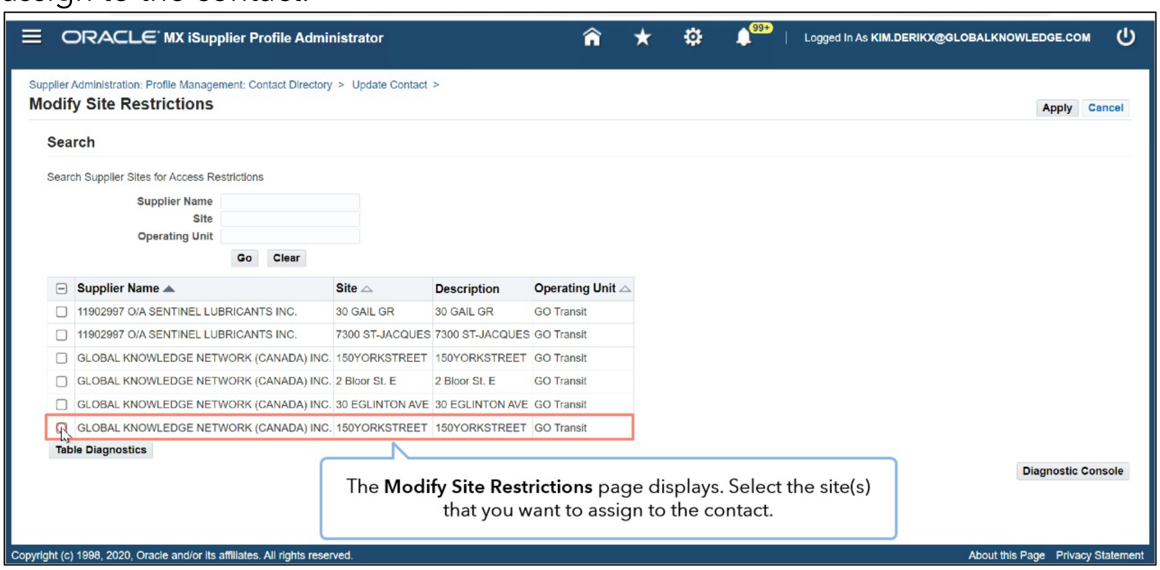
Further down the page, you can restrict access for the contact in iSupplier by editing the **Site Restriction** section. If you do not restrict a contact by site, the contact will have access to all the sites linked to your organization's profile.



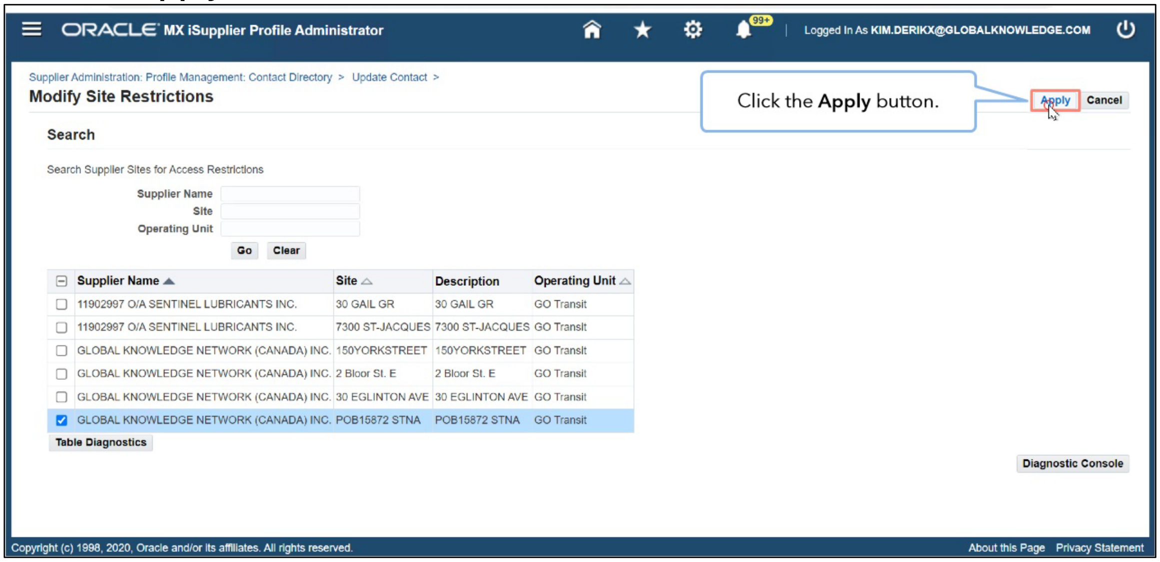
36. To restrict the contact by site, click the **Modify Sites** button.



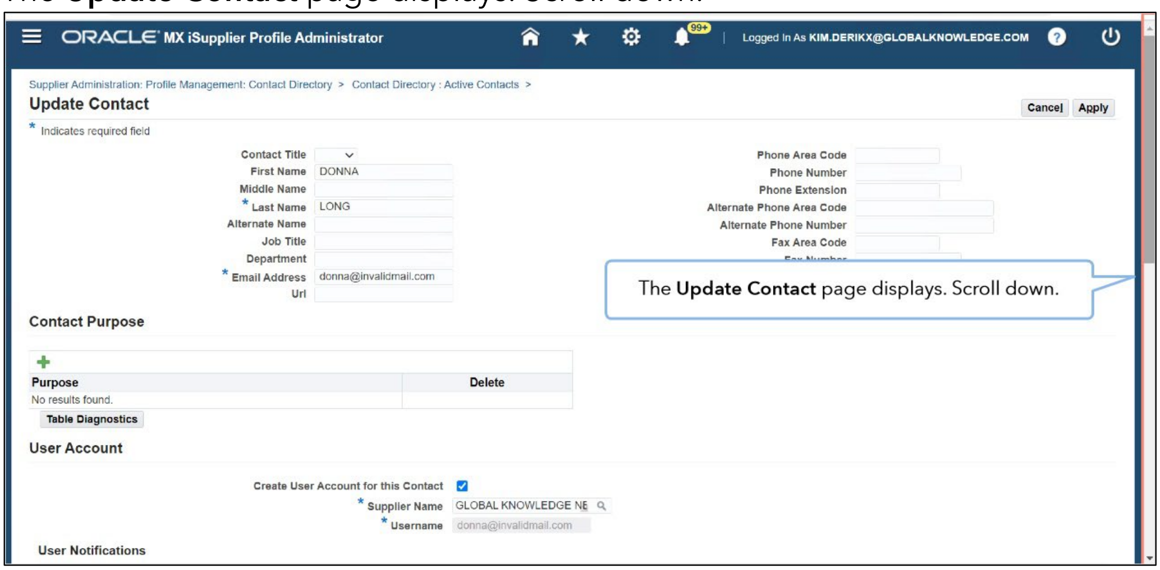
37. The **Modify Site Restrictions** page displays. Select the site(s) that you want to assign to the contact.



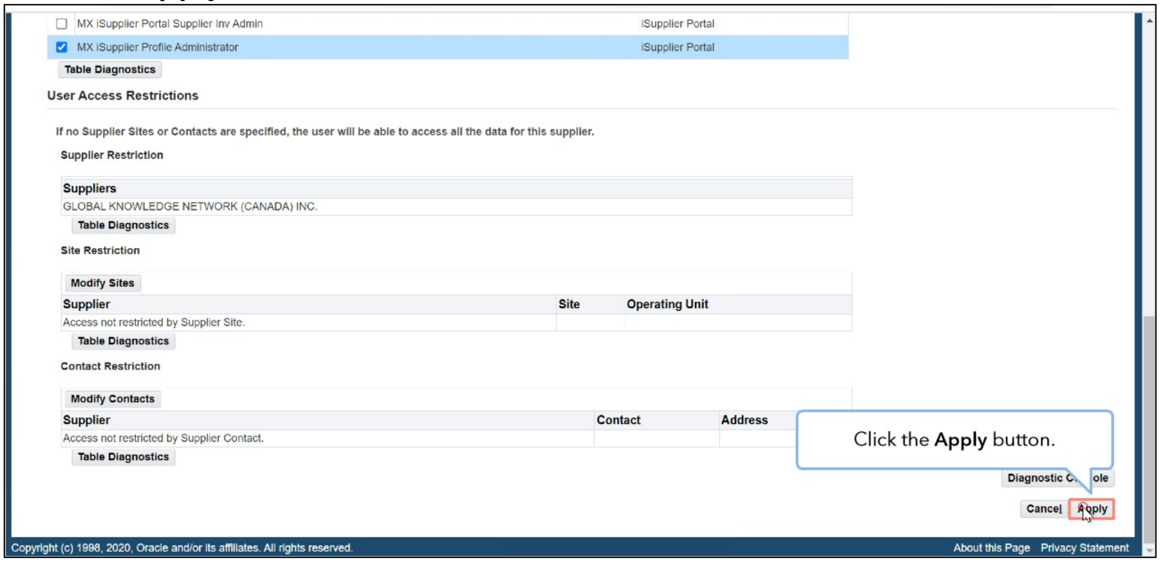
38. Click the **Apply** button.



39. The **Update Contact** page displays. Scroll down.

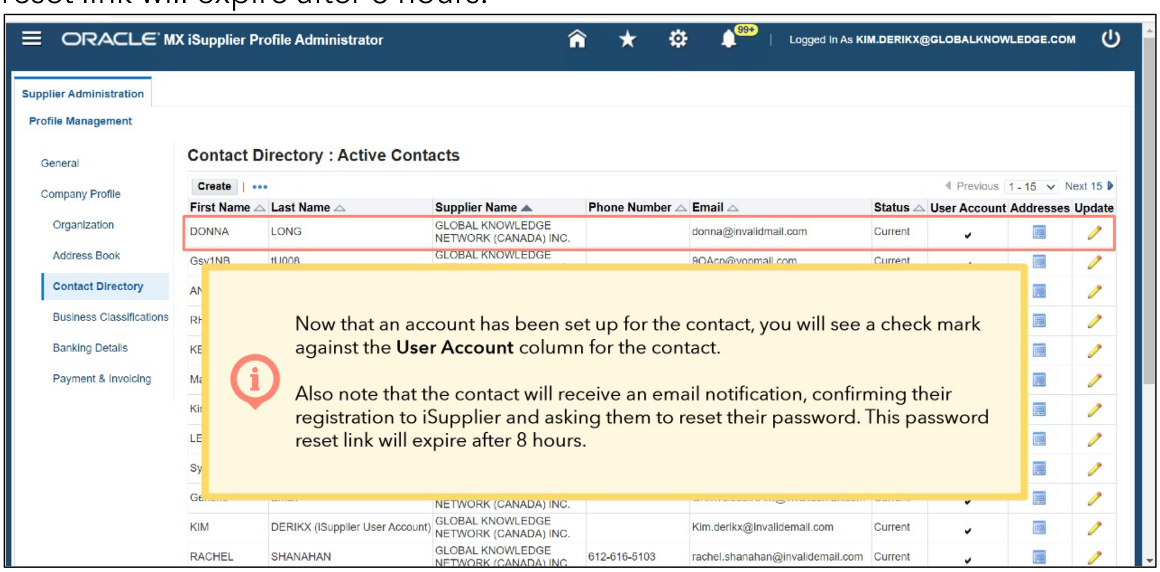


40. Click the **Apply** button.

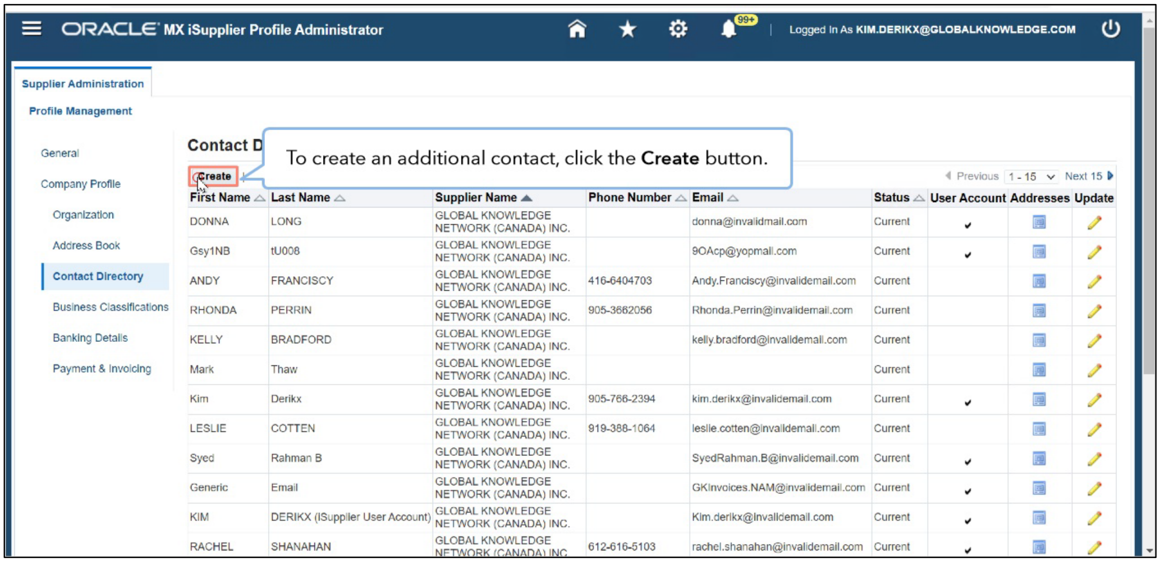


Now that an account has been set up for the contact, you will see a check mark against the User Account column for the contact.

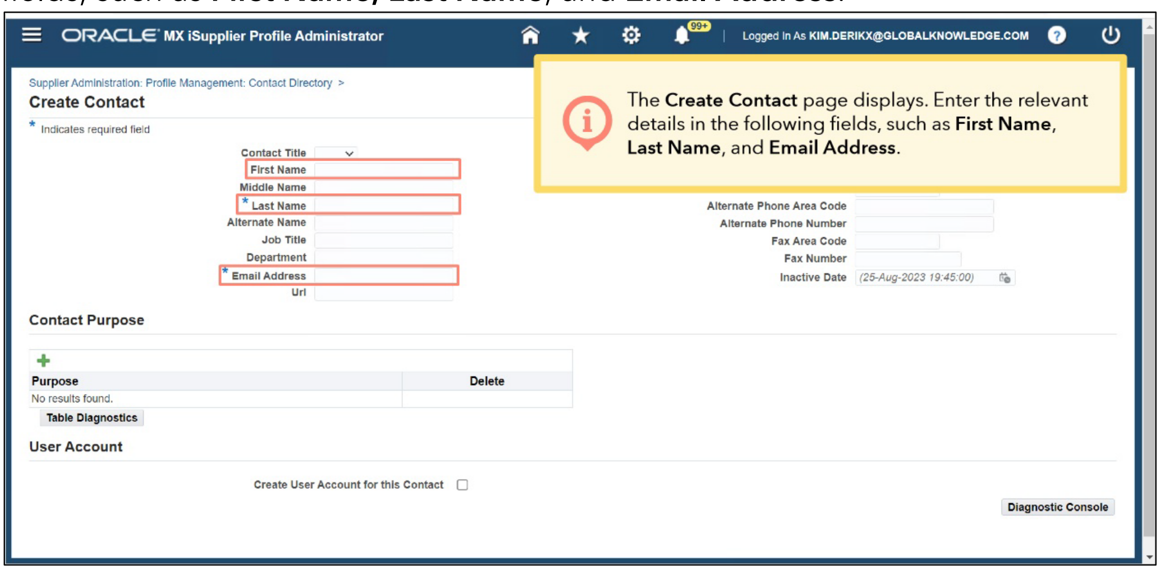
Also note that the contact will receive an email notification, confirming their registration to iSupplier and asking them to reset their password. This password reset link will expire after 8 hours.



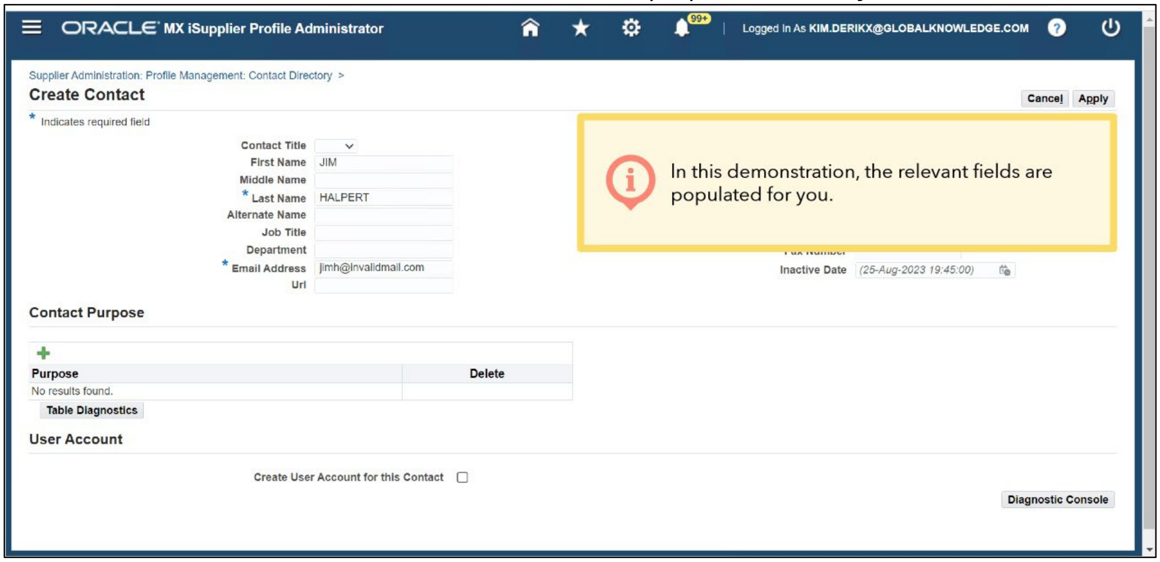
41. To create an additional contact, click the **Create** button.



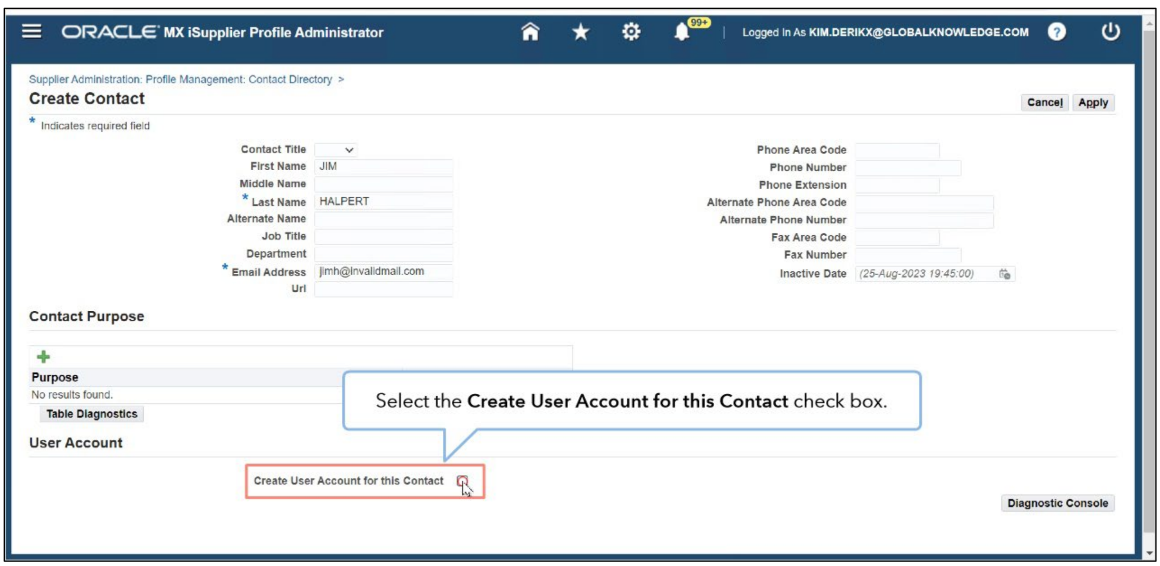
The **Create Contact** page displays. Enter the relevant details in the following fields, such as **First Name, Last Name**, and **Email Address**.



In this demonstration, the relevant fields are populated for you.

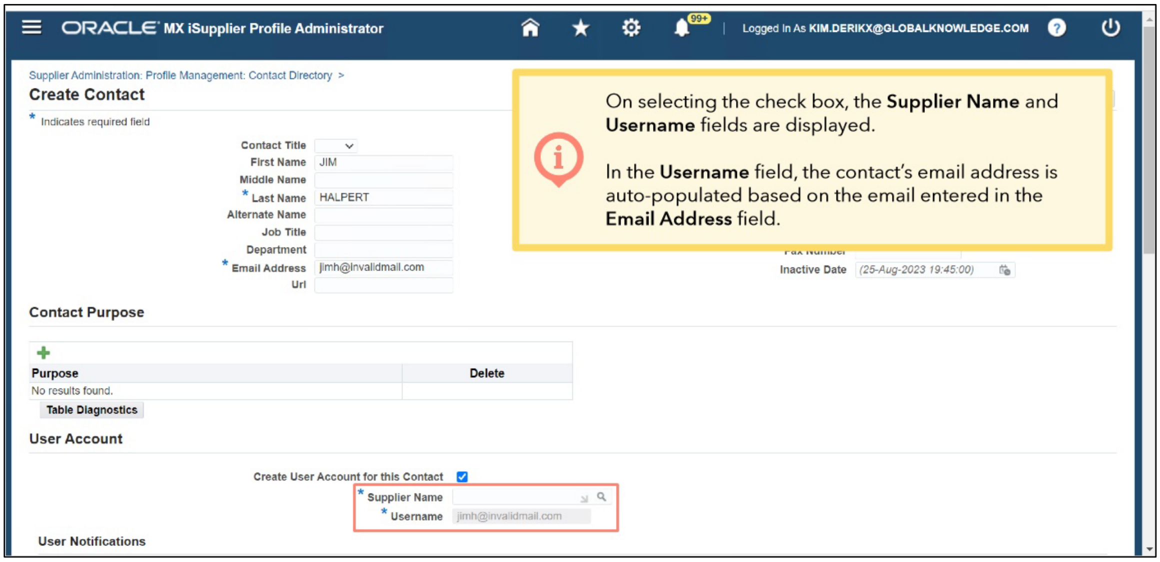


42. Select the **Create User Account for this Contact** check box.

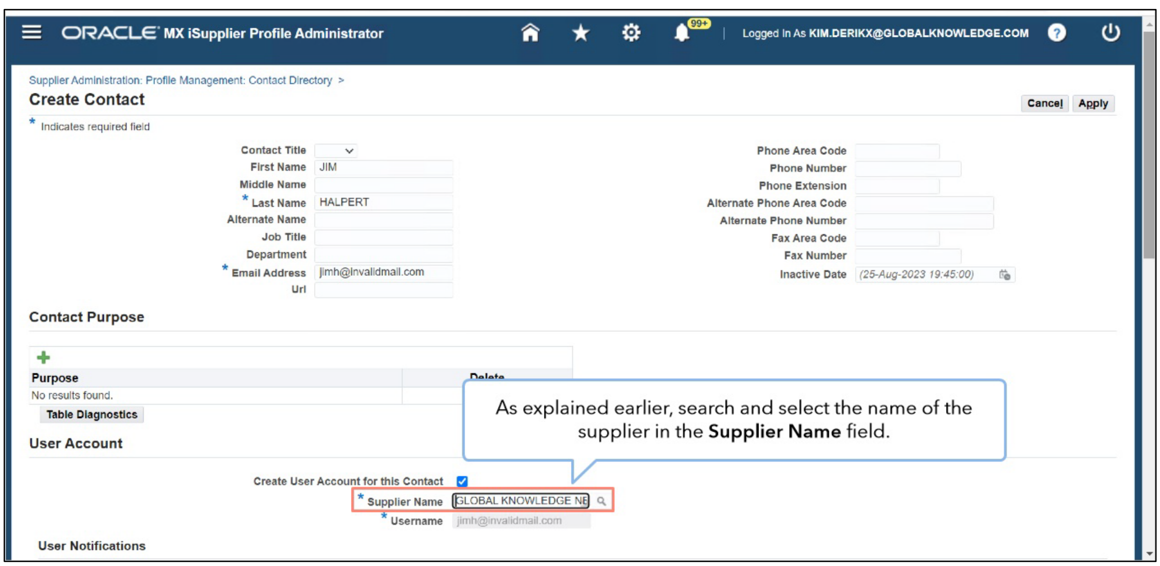


On selecting the check box, the **Supplier Name** and **Username** fields are displayed.

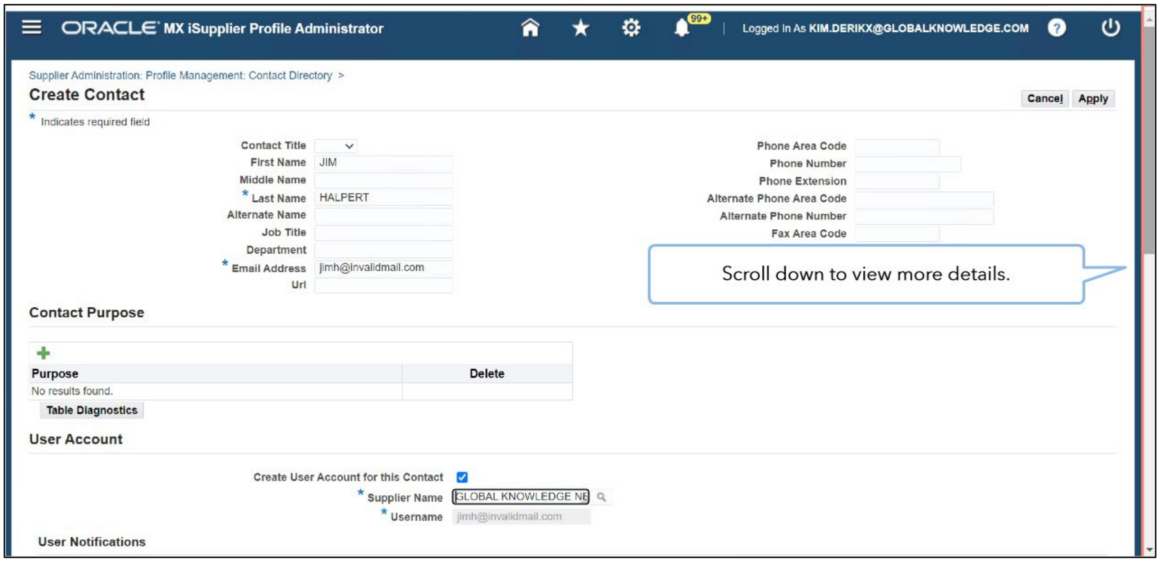
In the **Username** field, the contact's email address is auto-populated based on the email entered in the **Email Address** field.



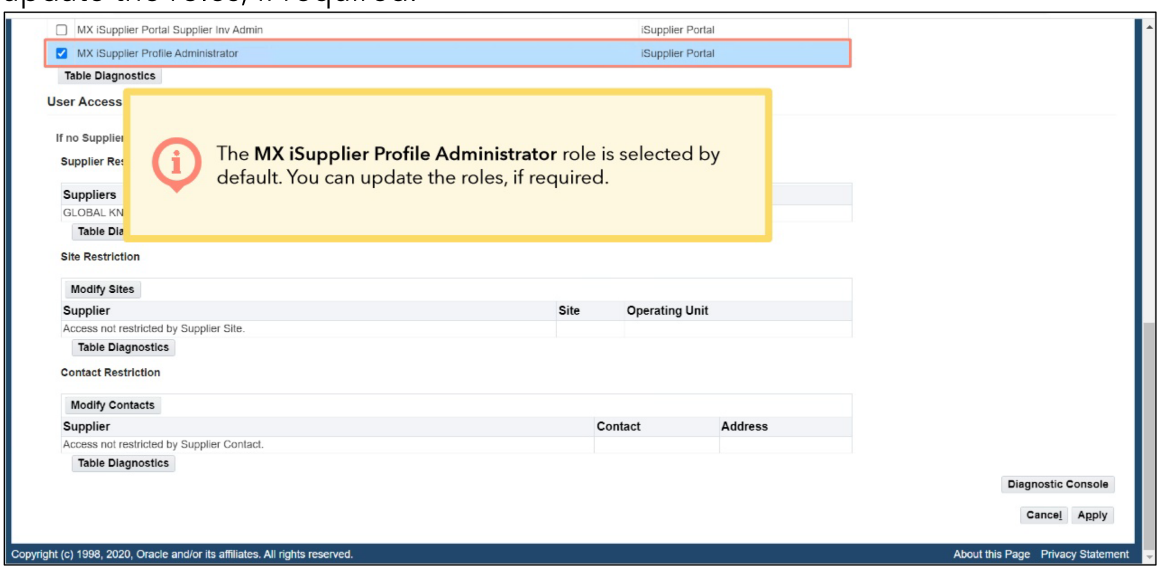
43. As explained earlier, search and select the name of the supplier in the **Supplier Name** field.



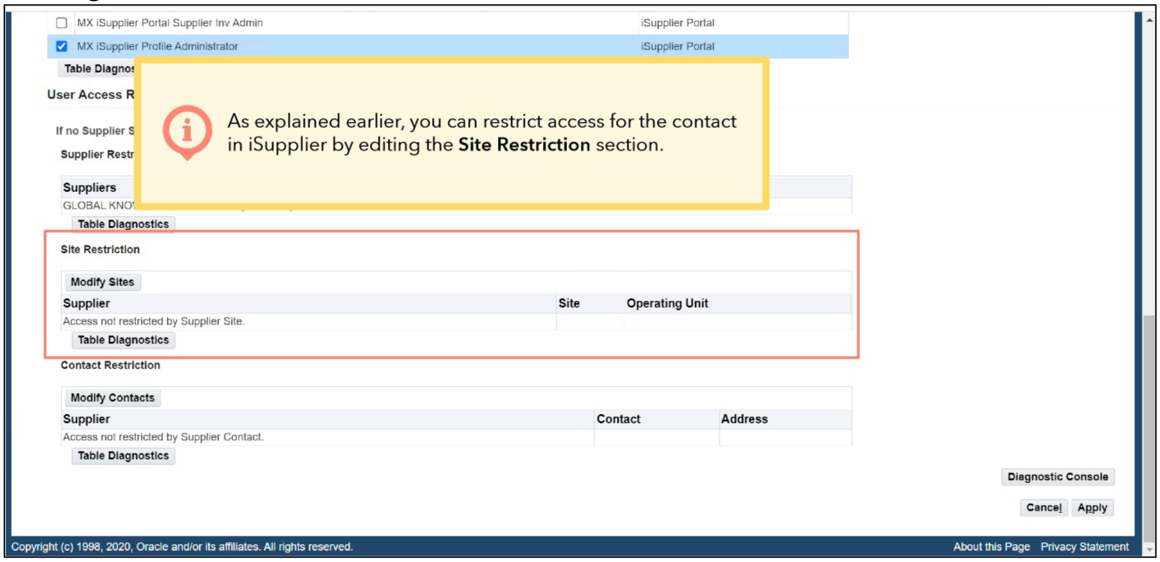
44. Scroll down to view more details



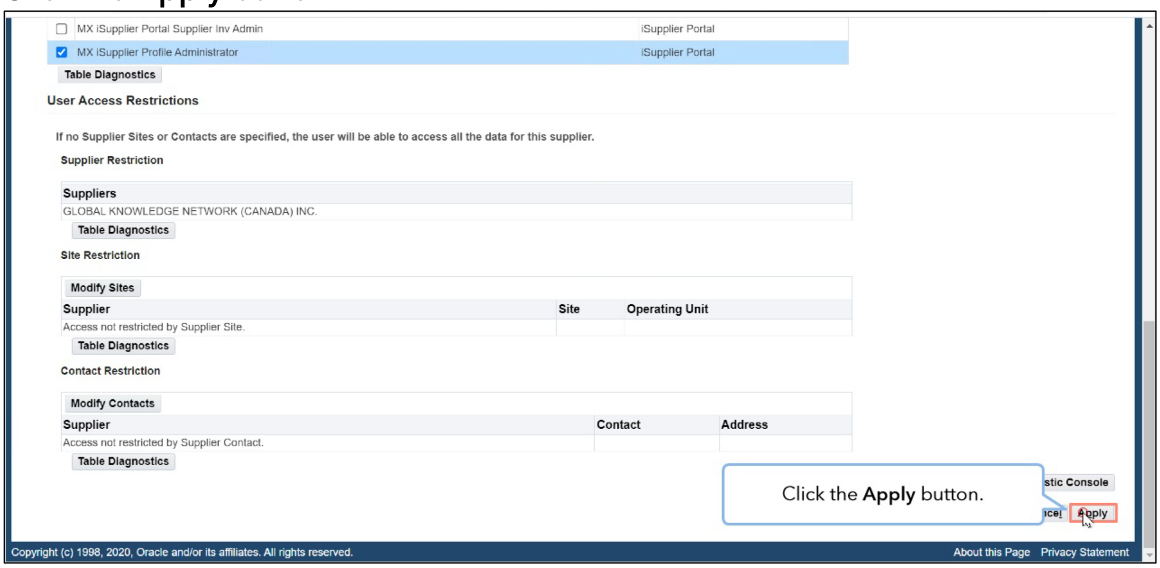
The **MX iSupplier Profile Administrator** role is selected by default. You can update the roles, if required.



As explained earlier, you can restrict access for the contact in iSupplier by editing the **Site Restriction** section.

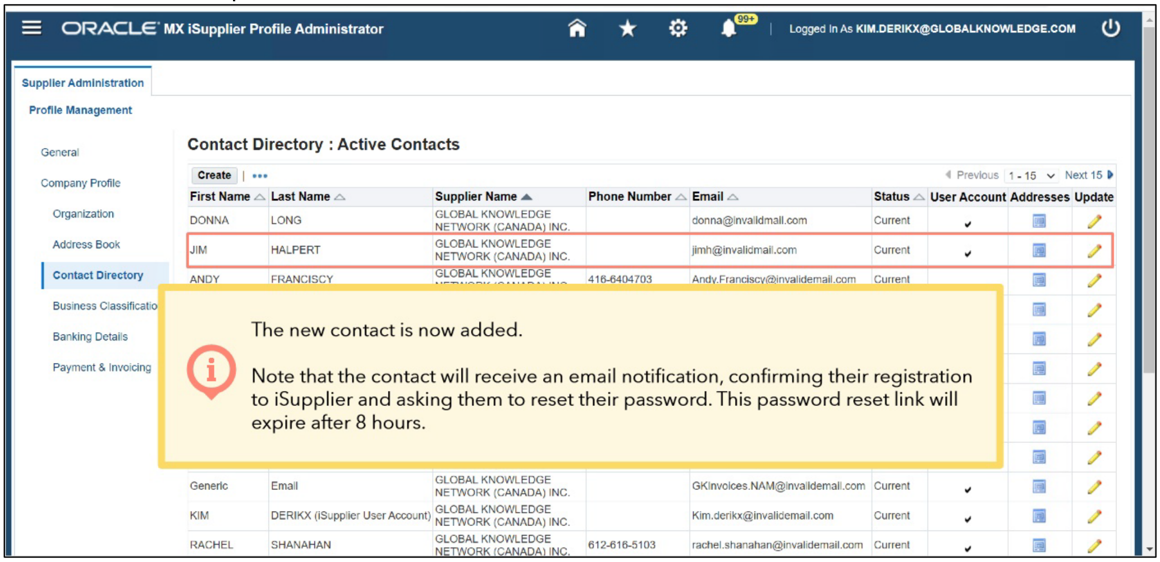


45. Click the **Apply** button.

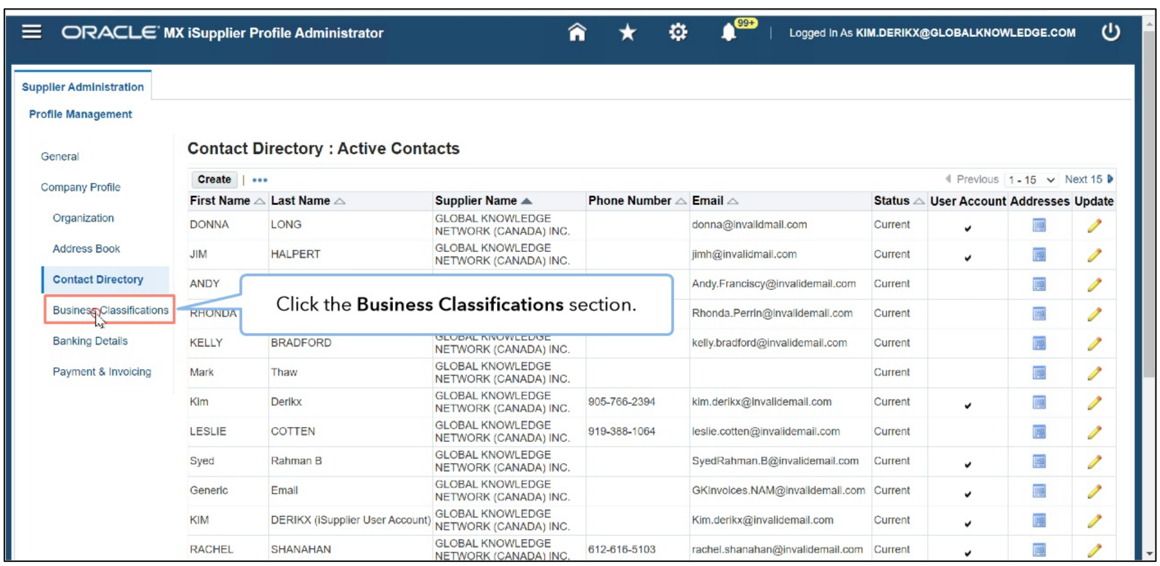


The new contact is now added.

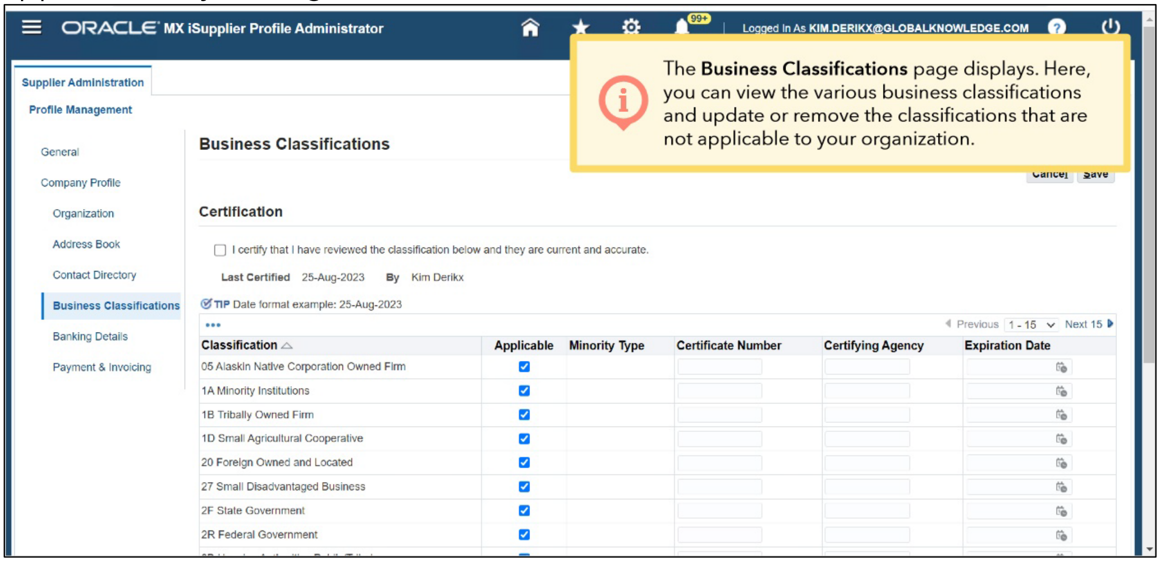
Note that the contact will receive an email notification, confirming their registration to iSupplier and asking them to reset their password. This password reset link will expire after 8 hours.



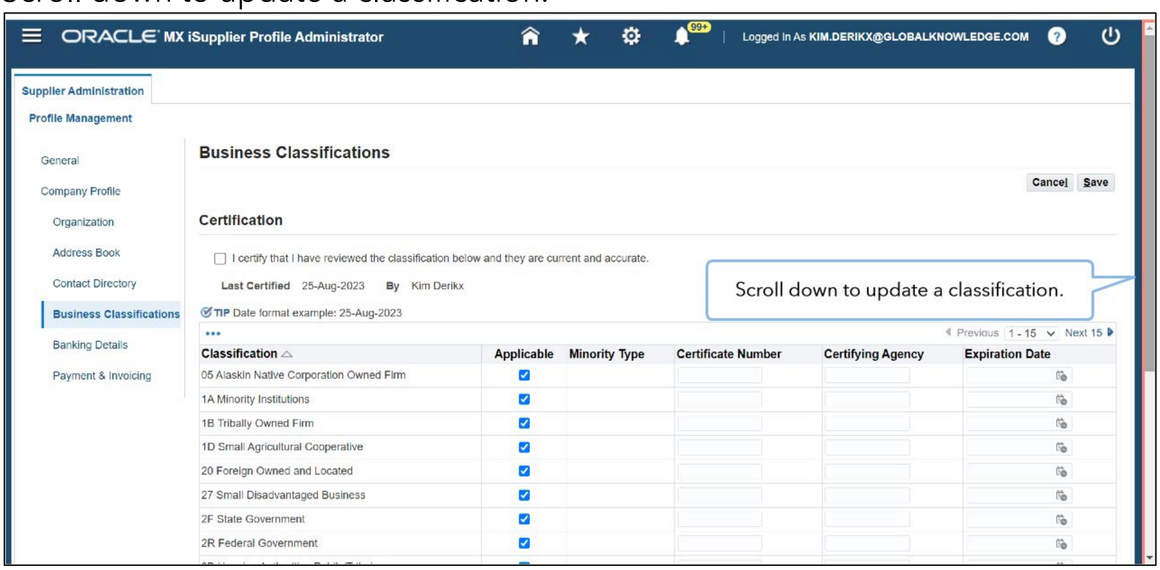
46. Click the **Business Classifications** section.



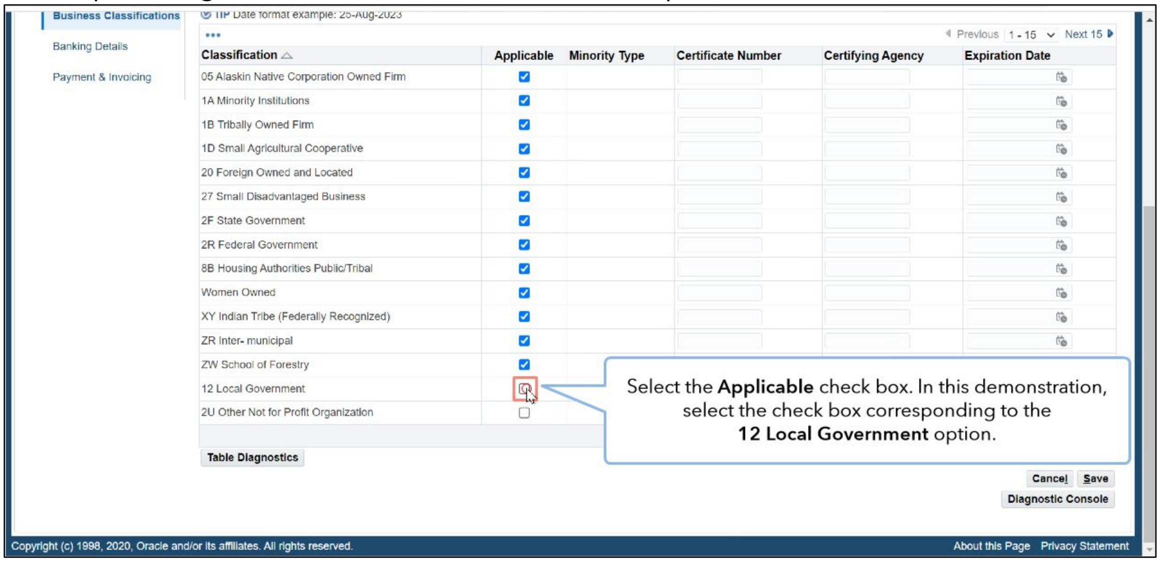
The **Business Classifications** page displays. Here, you can view the various business classifications and update or remove the classifications that are not applicable to your organization.



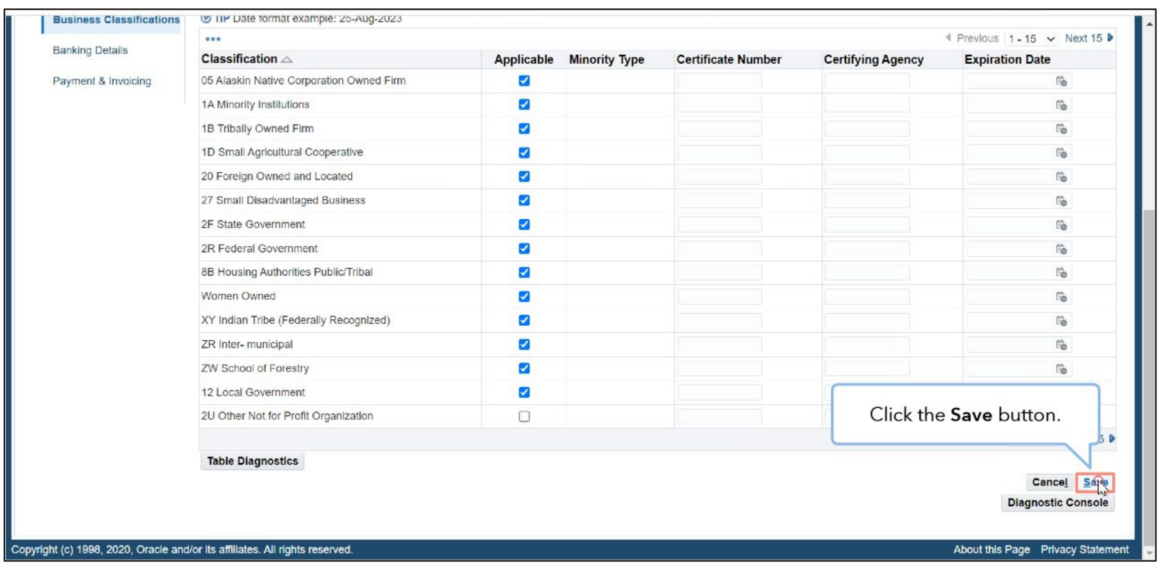
47. Scroll down to update a classification.



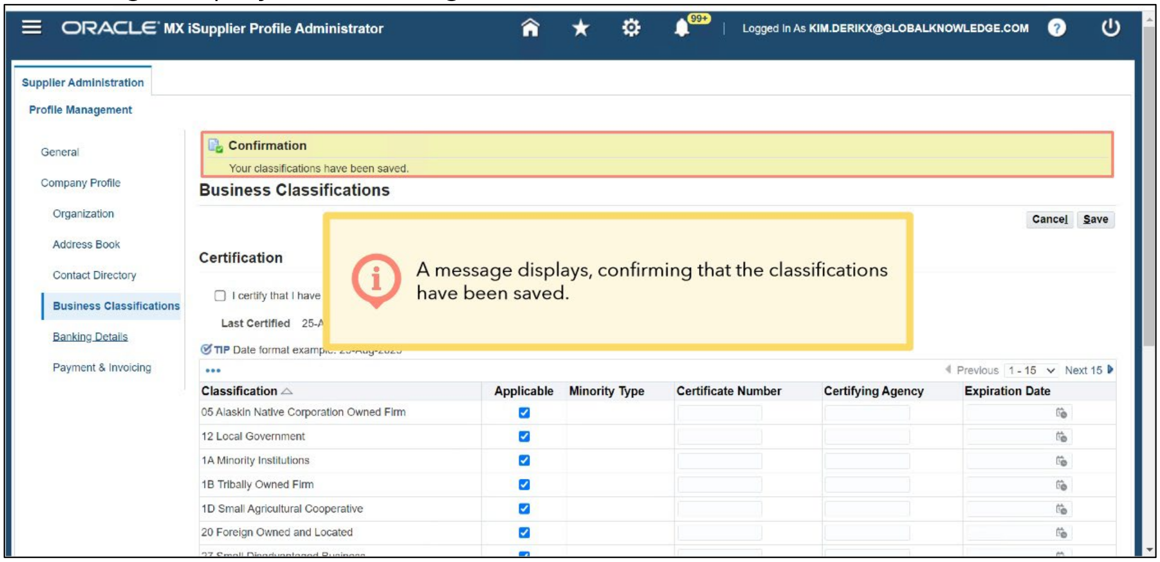
48. Select the **Applicable** check box. In this demonstration, select the check box corresponding to the **12 Local Government** option.



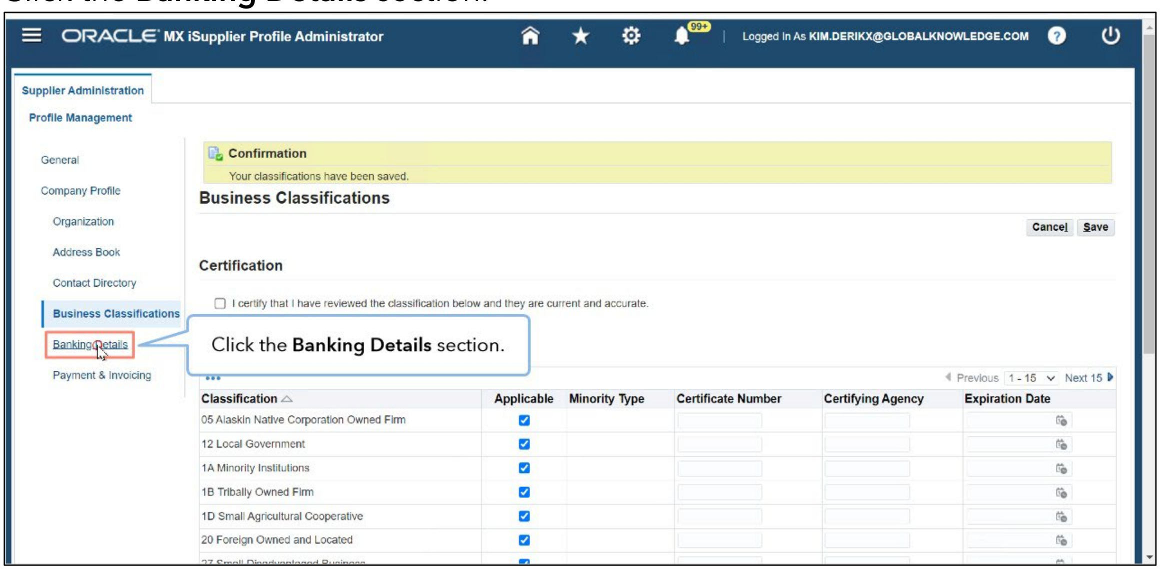
49. Click the **Save** button.



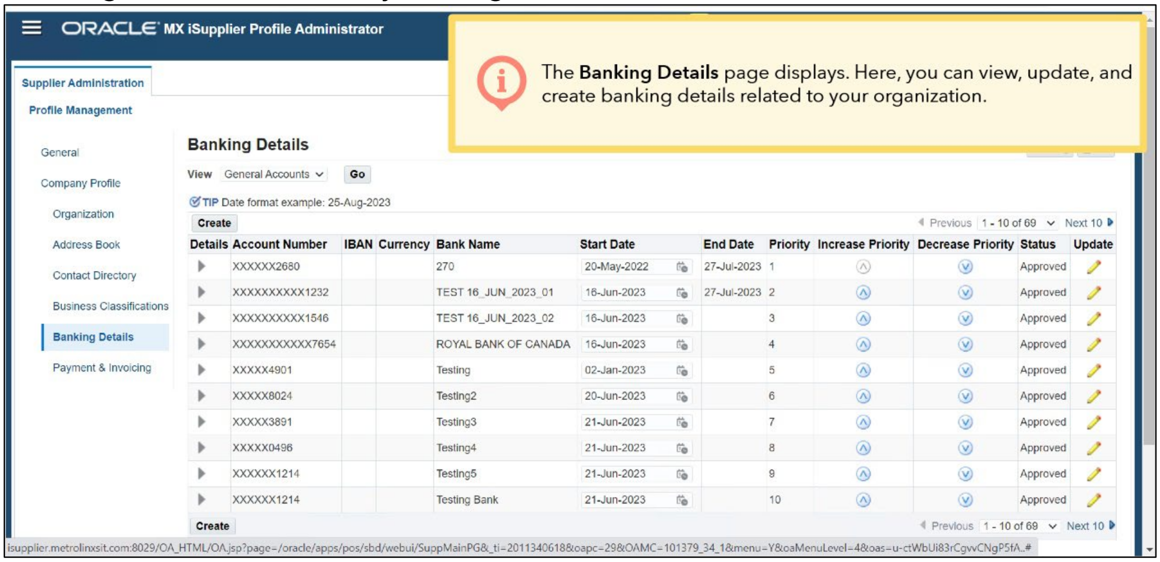
A message displays, confirming that the classifications have been saved.



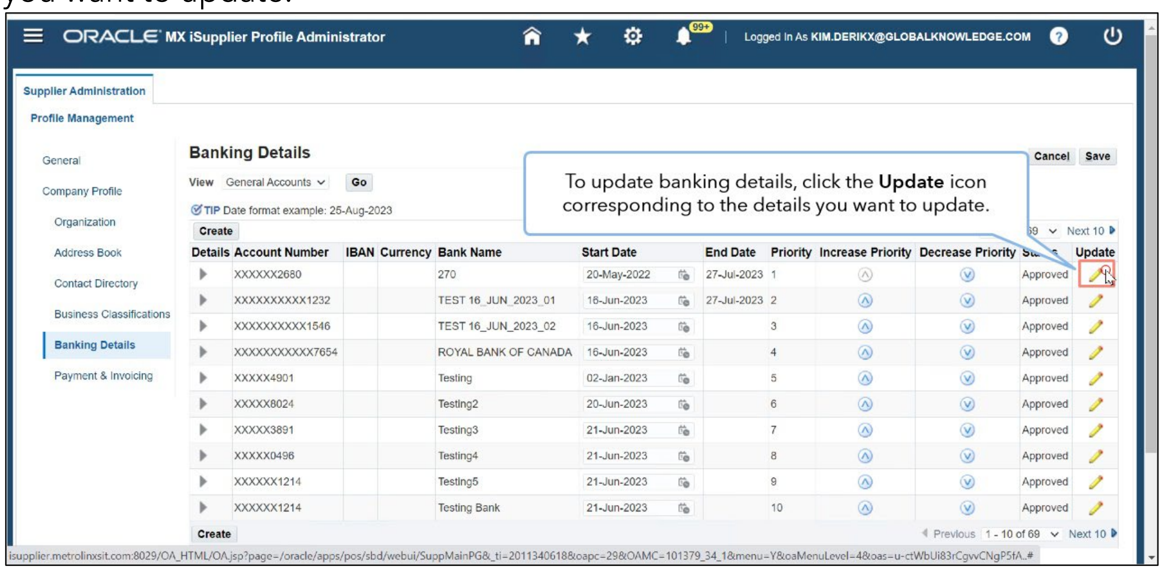
50. Click the **Banking Details** section.



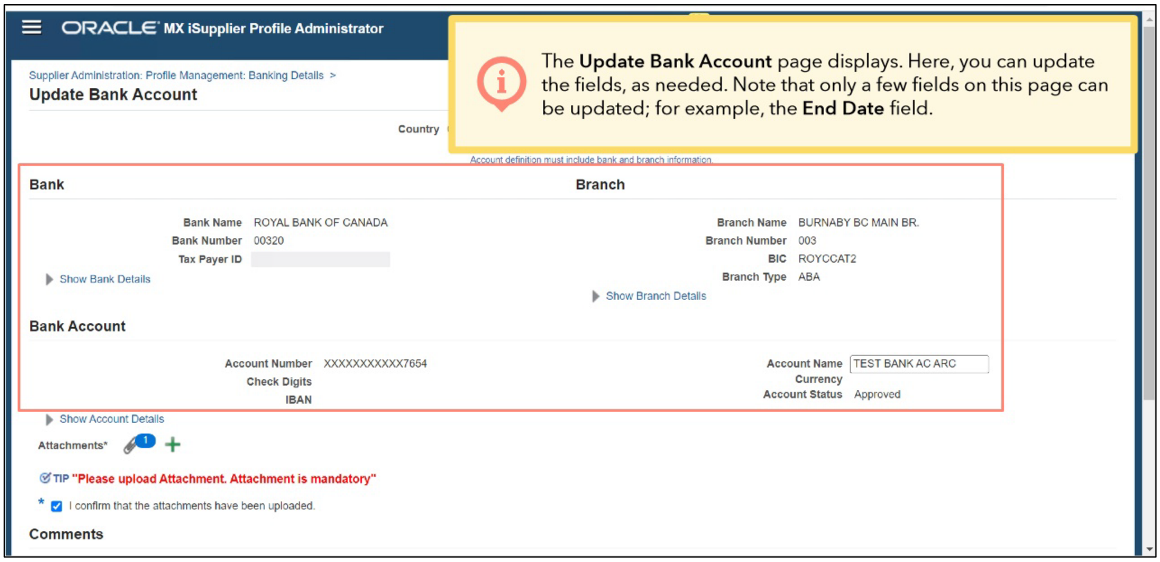
The **Banking Details** page displays. Here, you can view, update, and create banking details related to your organization.



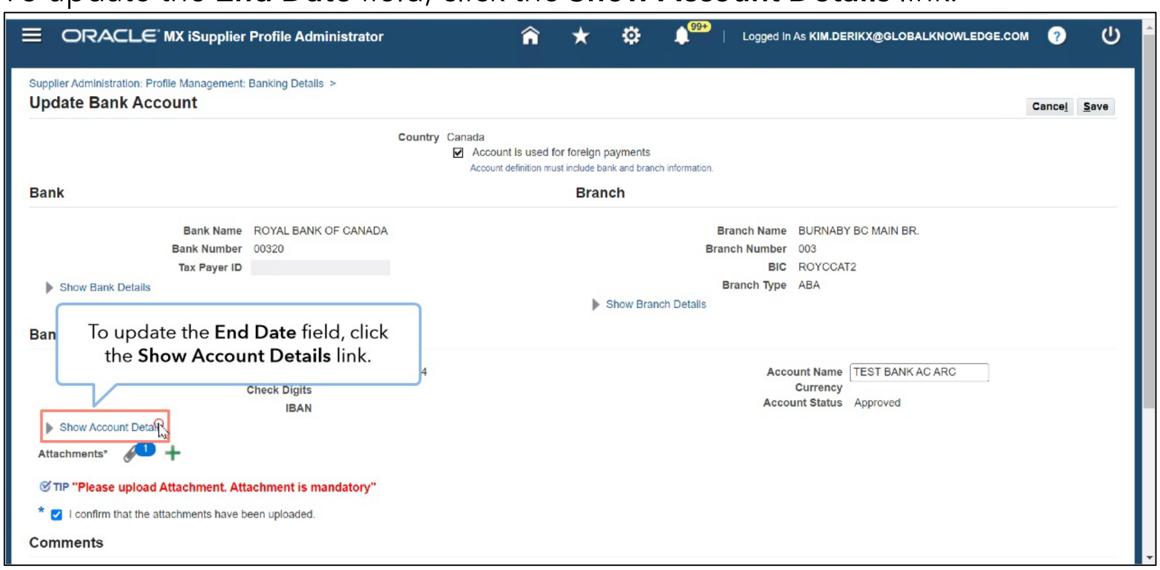
51. To update banking details, click the **Update** icon corresponding to the details you want to update.



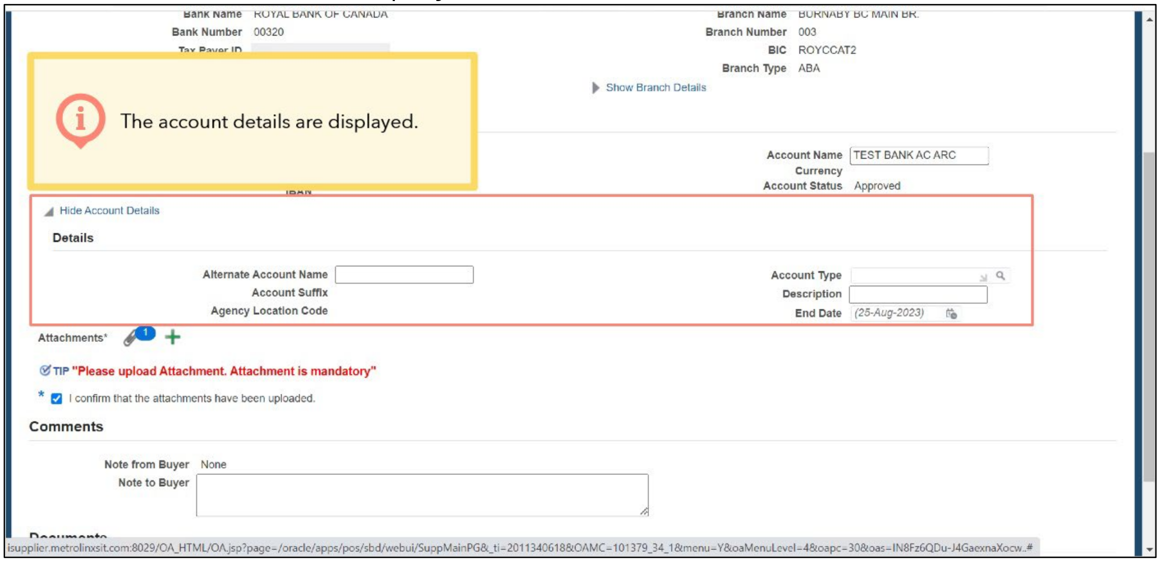
The **Update Bank Account** page displays. Here, you can update the fields, as needed. Note that only a few fields on this page can be updated; for example, the **End Date** field.



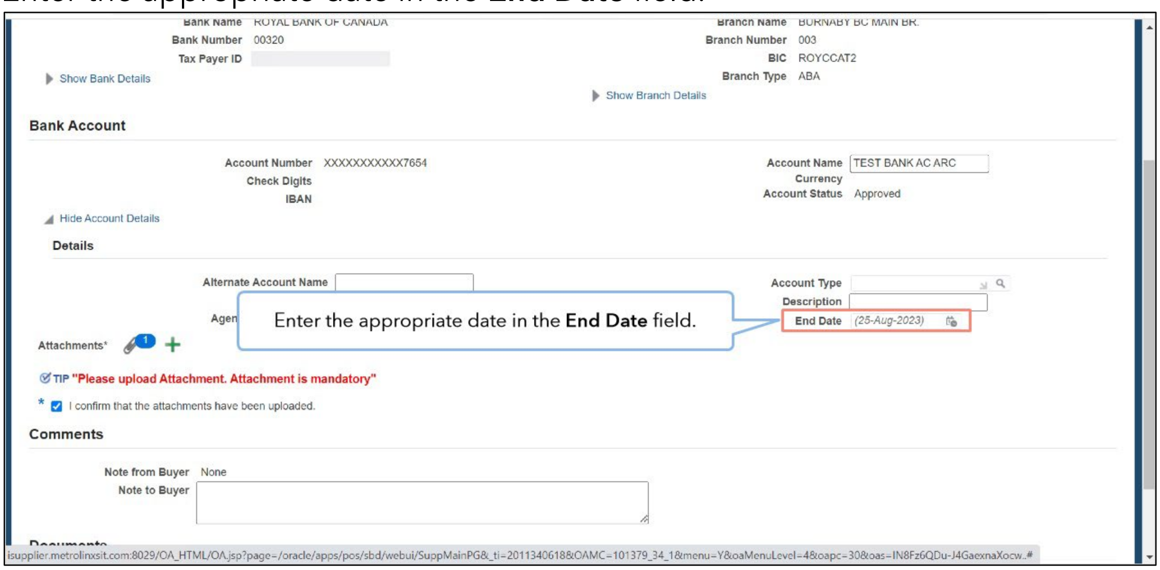
52. To update the **End Date** field, click the **Show Account Details** link.



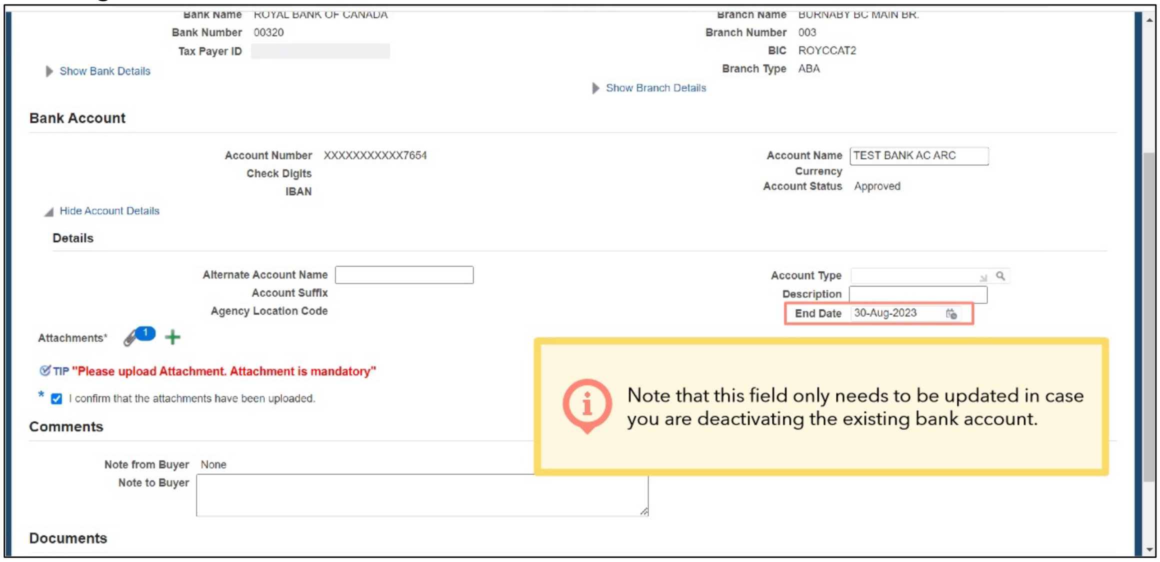
The account details are displayed.



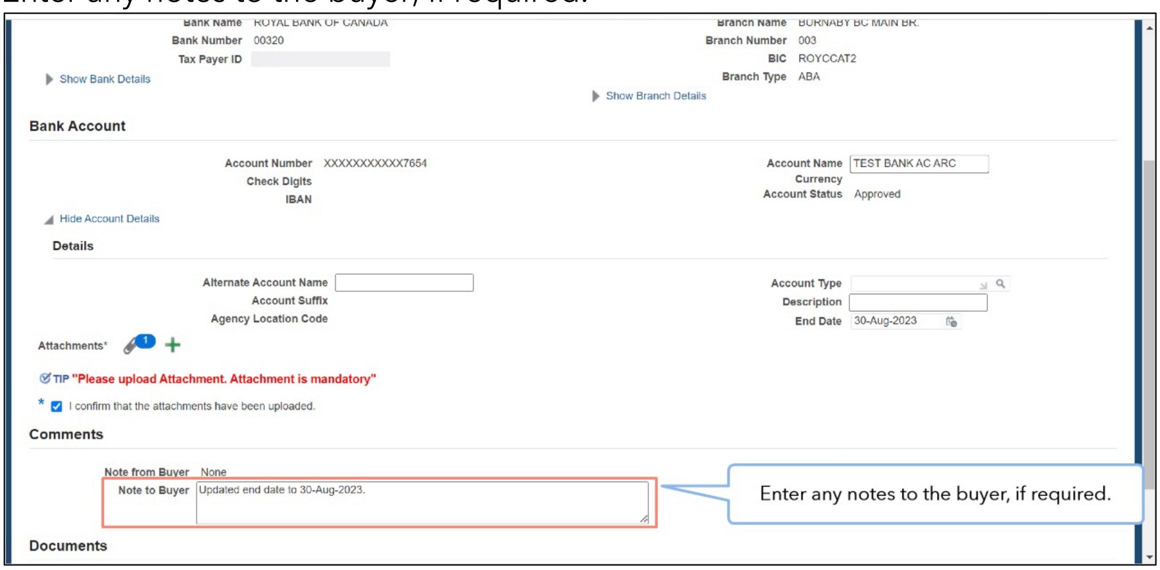
53. Enter the appropriate date in the **End Date** field.



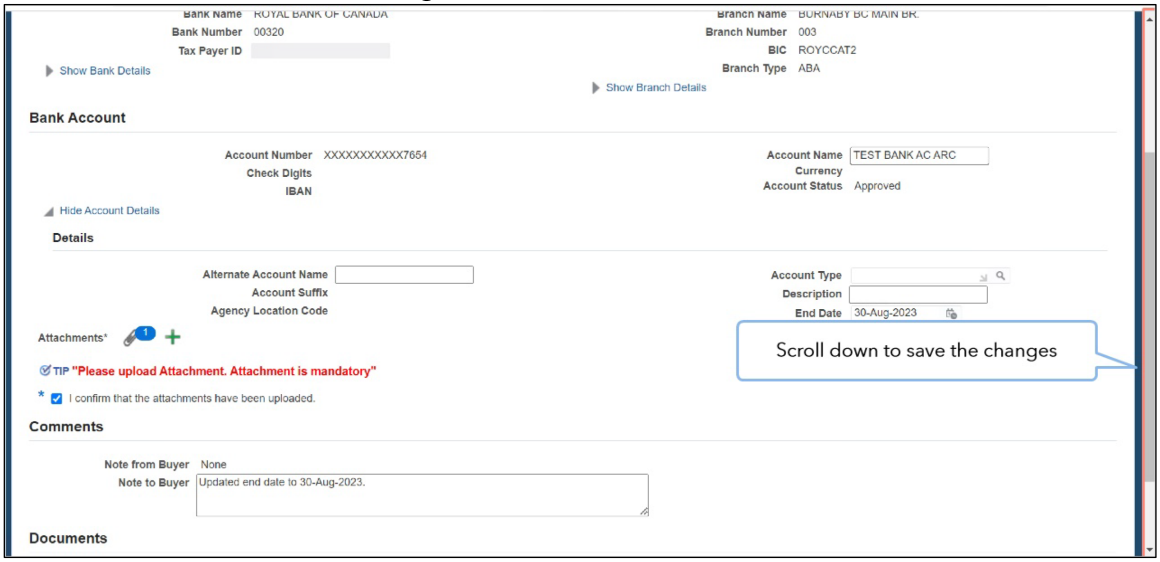
Note that this field only needs to be updated in case you are deactivating the existing bank account.



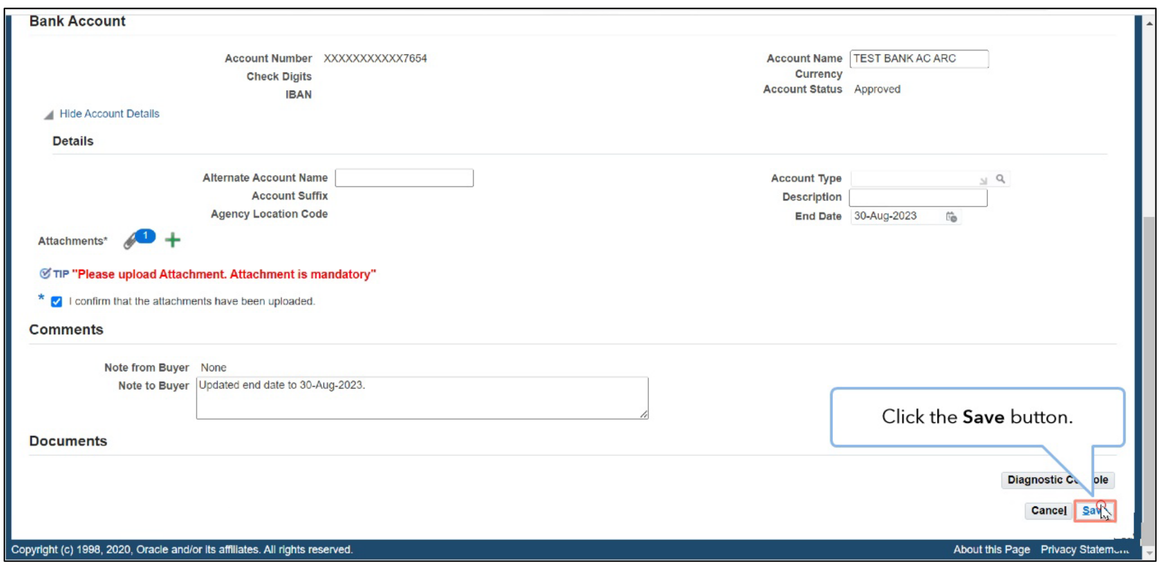
54. Enter any notes to the buyer, if required.



55. Scroll down to save the changes.

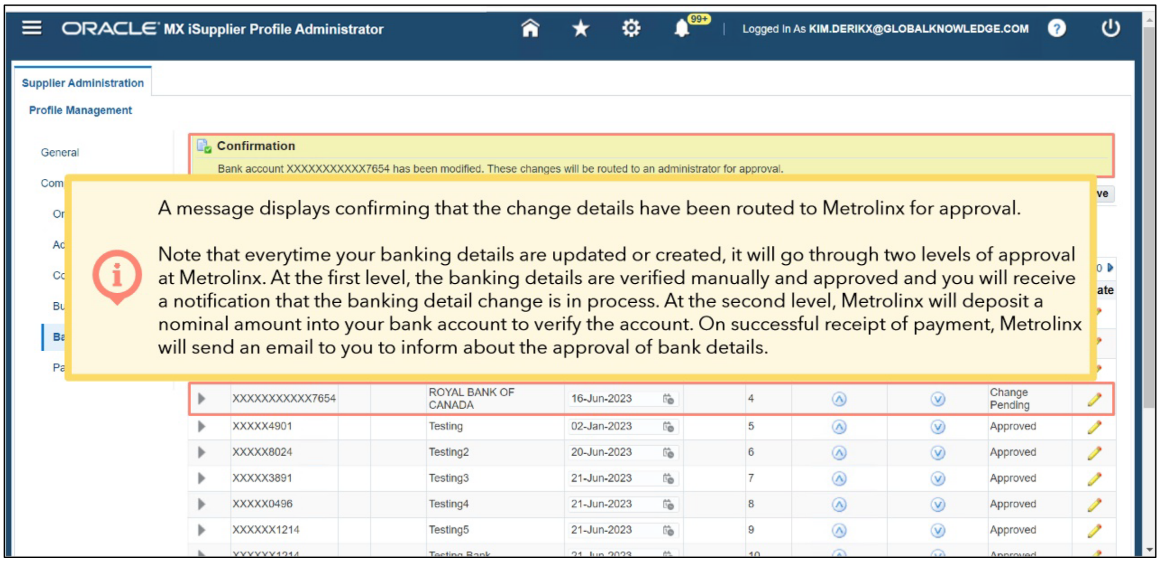


56. Click the **Save** button.

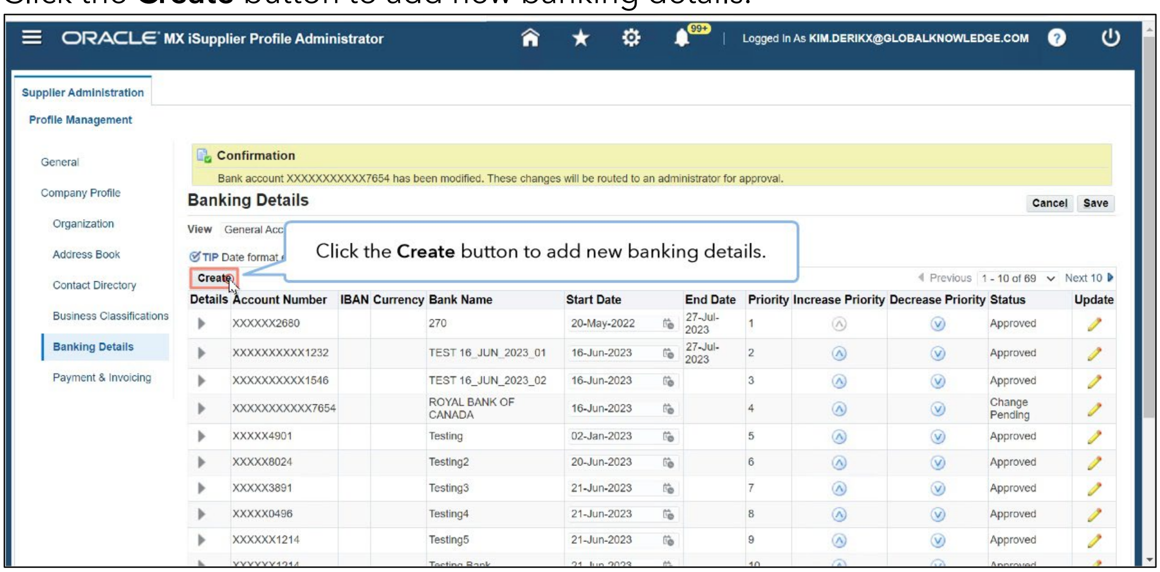


A message displays confirming that the change details have been routed to Metrolinx for approval.

Note that every time your banking details are updated or created, it will go through two levels of approval at Metrolinx. At the first level, the banking details are verified manually and approved, and you will receive a notification that the banking detail change is in process. At the second level, Metrolinx will deposit a nominal amount into your bank account to verify the account. Upon successful receipt of payment, Metrolinx will send an email to you to inform you about the approval of bank details.

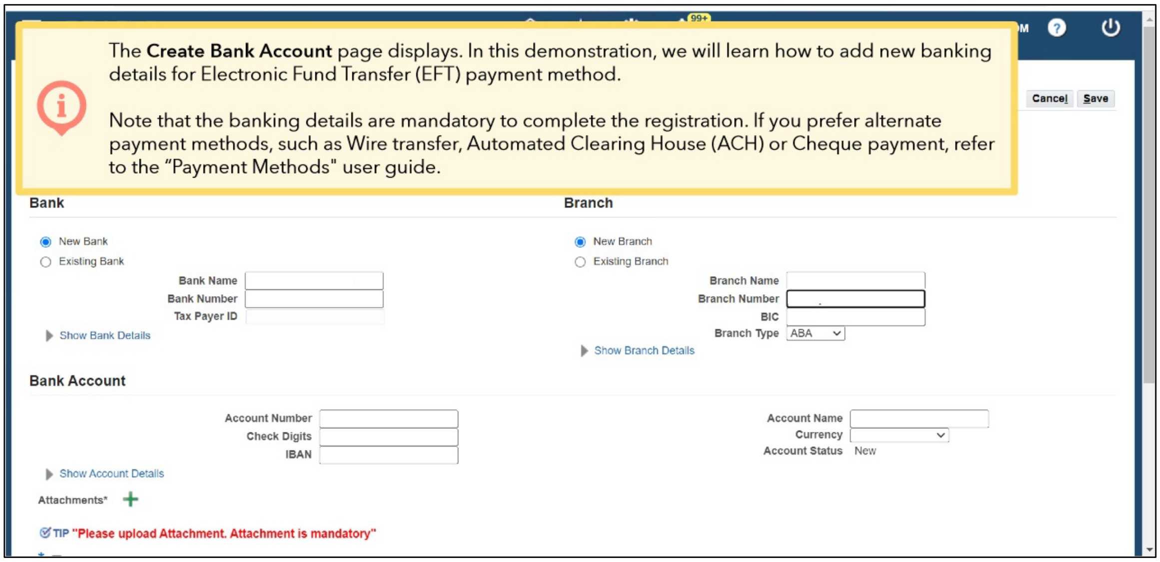


57. Click the **Create** button to add new banking details.

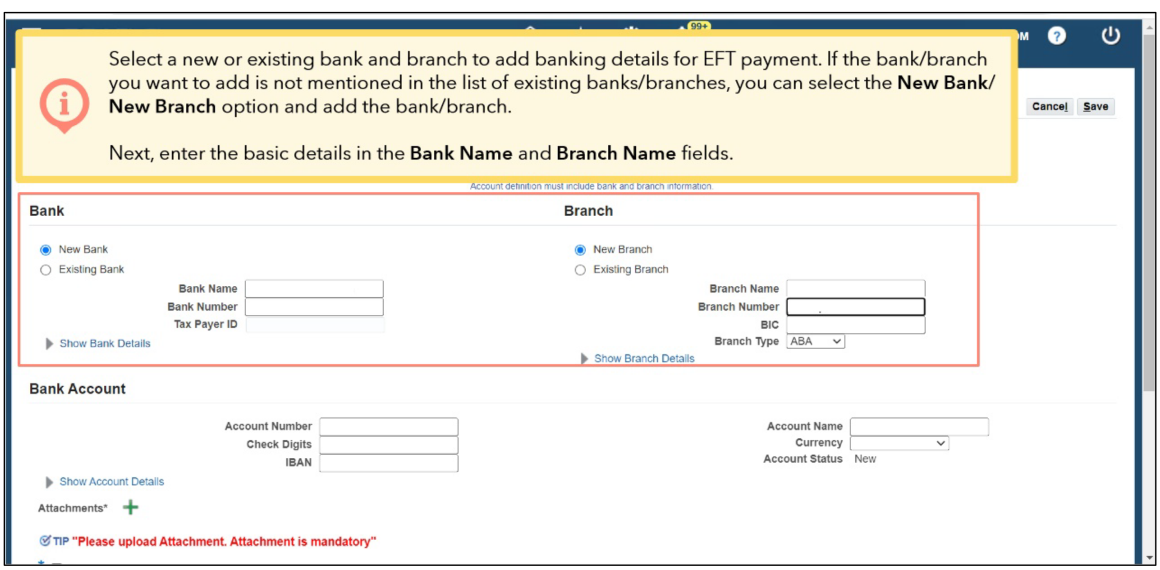


The **Create Bank Account** page displays. In this demonstration, we will learn how to add new banking details for the Electronic Fund Transfer (EFT) mode of payment.

Note that the banking details are mandatory to complete the registration. If you prefer alternate modes of payment such as Wire transfer, Automated Clearing House (ACH), or Cheque payment, refer to the "Payment Methods" user guide.

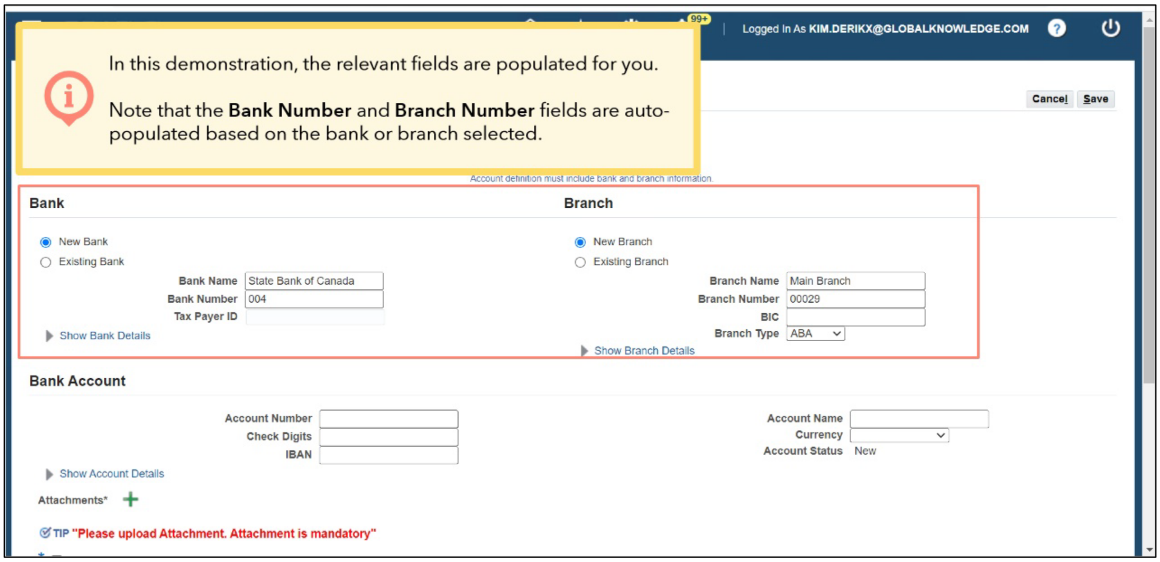


Select a new or existing bank and branch to add banking details for EFT payment. If the bank/branch you want to add is not mentioned in the list of existing banks/branches, you can select the **New Bank/New Branch** option and add the bank/branch. Next, enter the basic details in the **Bank Name** and **Branch Name** fields.

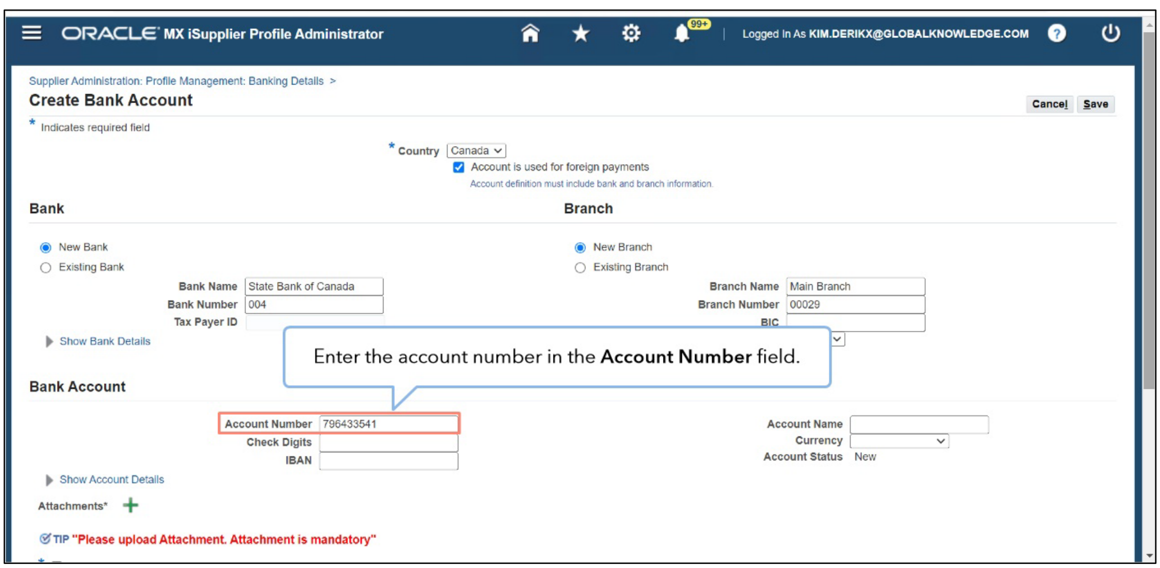


In this demonstration, the relevant fields are populated for you.

Note: The **Bank Number** and **Branch Number** fields are auto-populated based on the bank or branch selected.

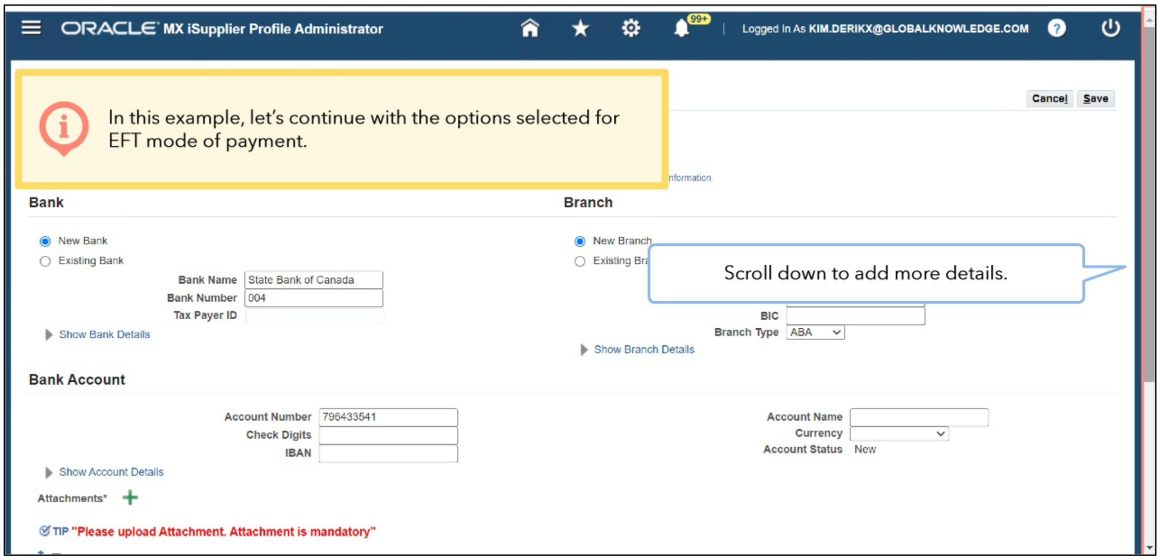


58. Enter the account number in the **Account Number** field.



In this example, let's continue with the options selected for EFT mode of payment.

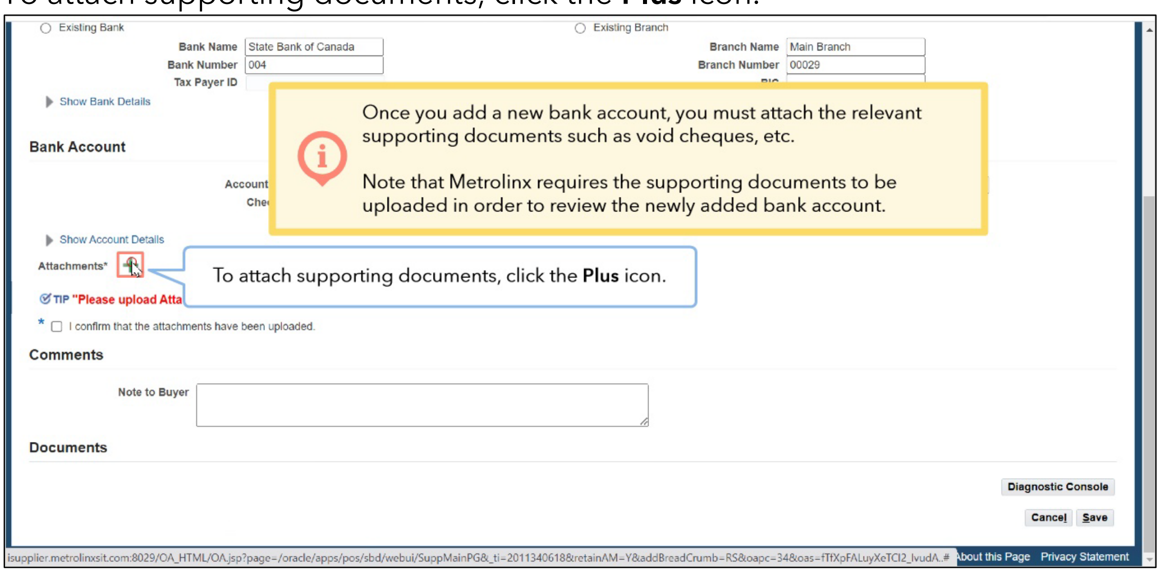
59. Scroll down to add more details.



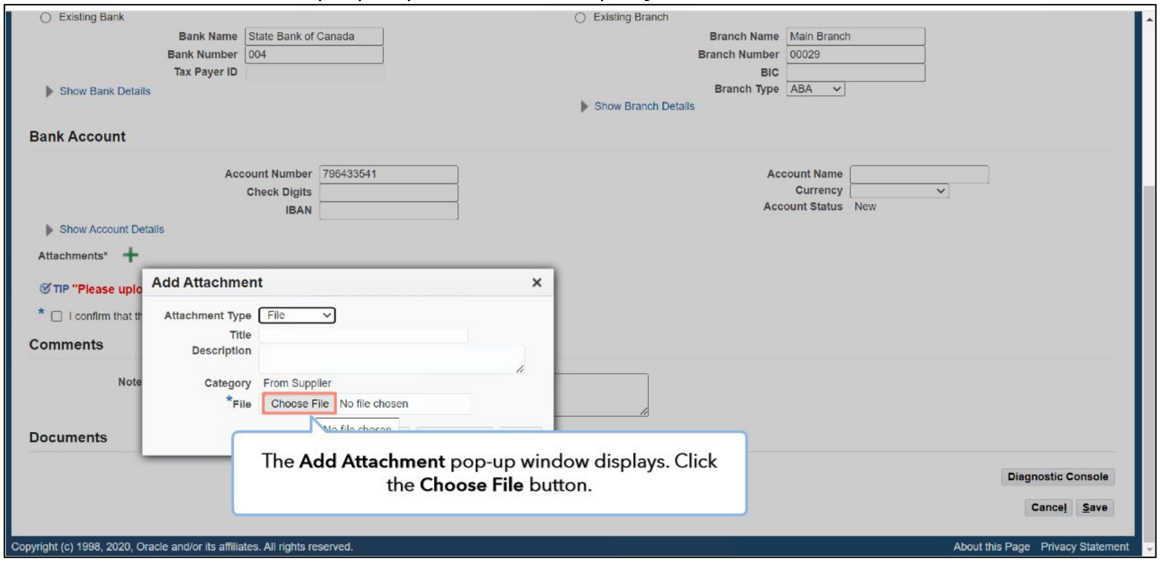
Once you add a new bank account, you must attach the relevant supporting documents such as void cheques, etc.

Note: Metrolinx requires the supporting documents to be uploaded in order to review the newly added bank account.

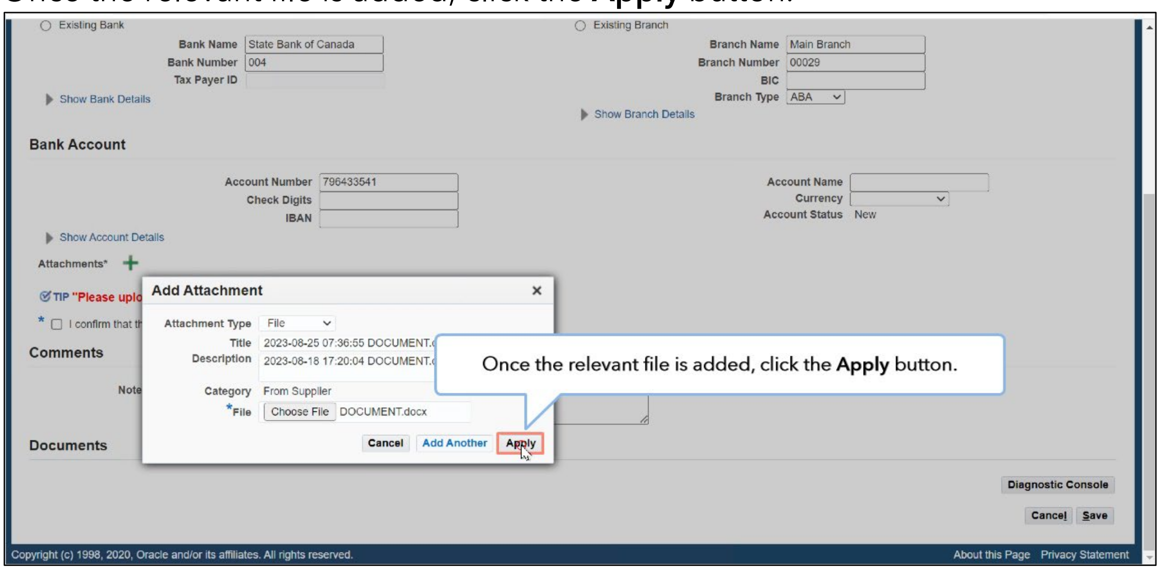
60. To attach supporting documents, click the **Plus** icon.



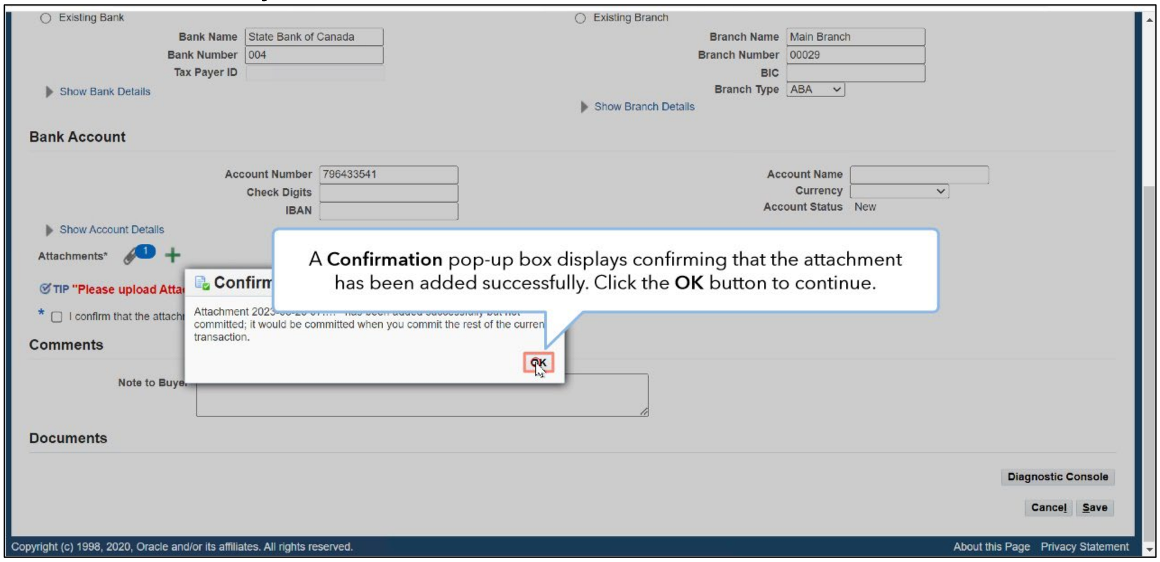
61. The **Add Attachment** pop-up window displays. Click the **Choose File** button.



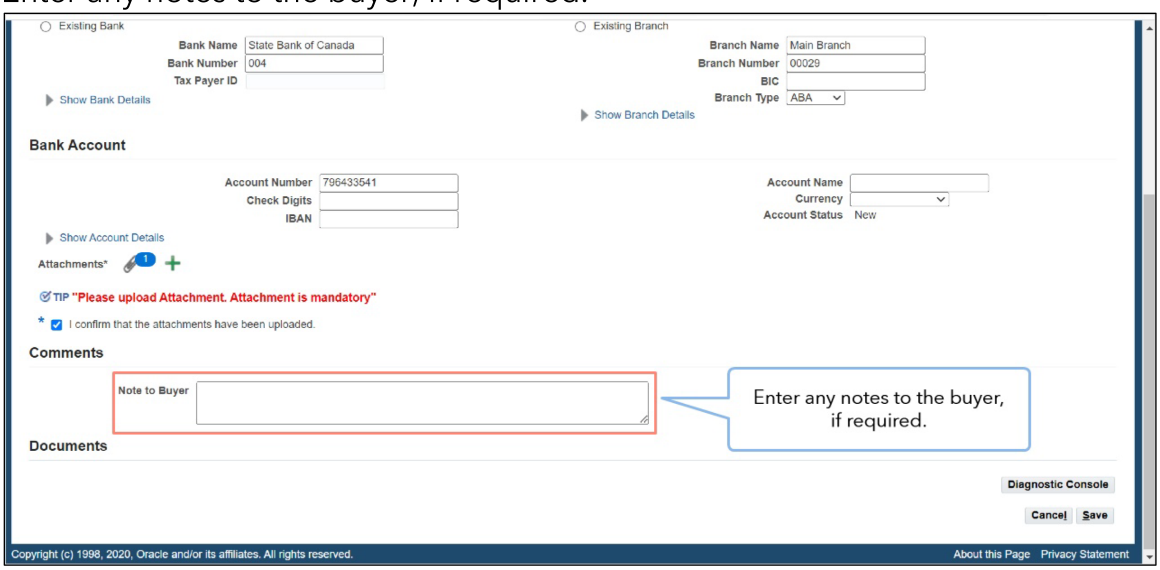
62. Once the relevant file is added, click the **Apply** button.



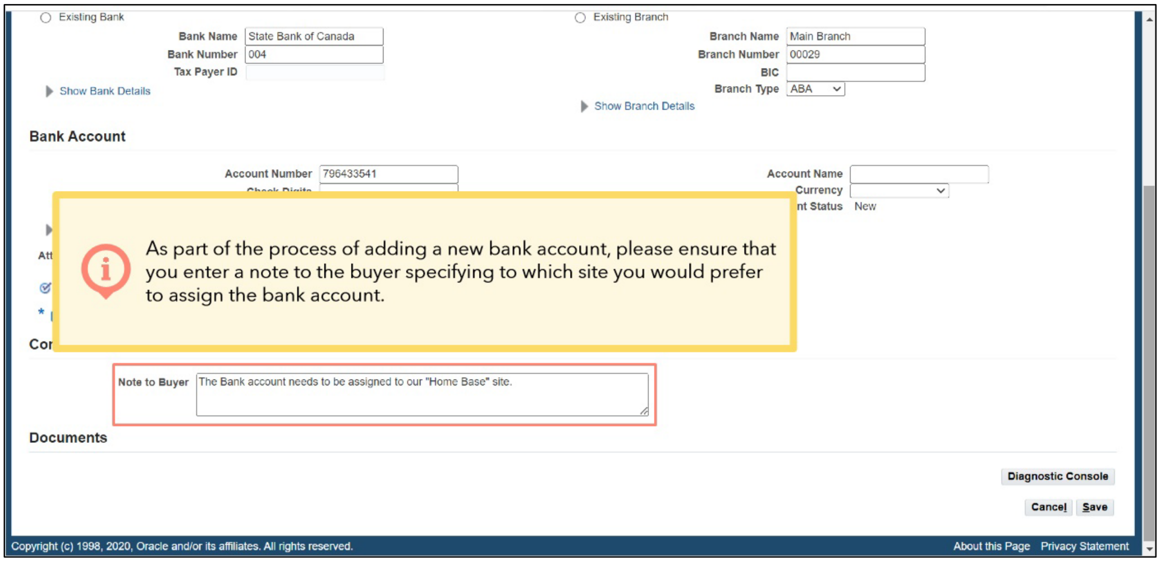
63. A **Confirmation** pop-up box displays confirming that the attachment has been added successfully. Click the **OK** button to continue.



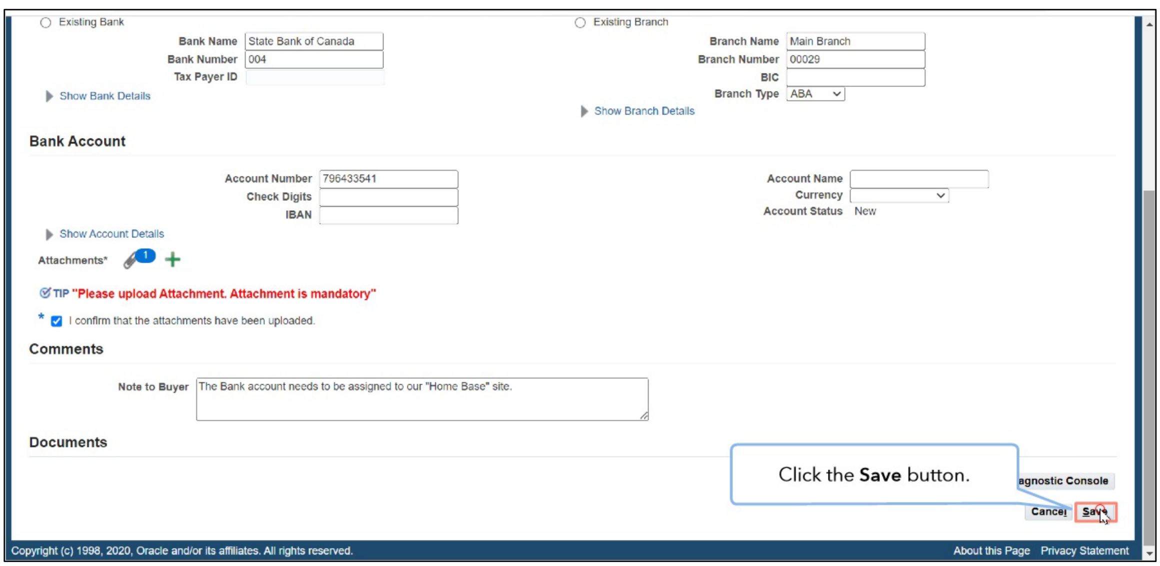
64. Enter any notes to the buyer, if required.



As part of the process of adding a new bank account, please ensure that you enter a note to the buyer specifying to which site you would prefer to assign the bank account.

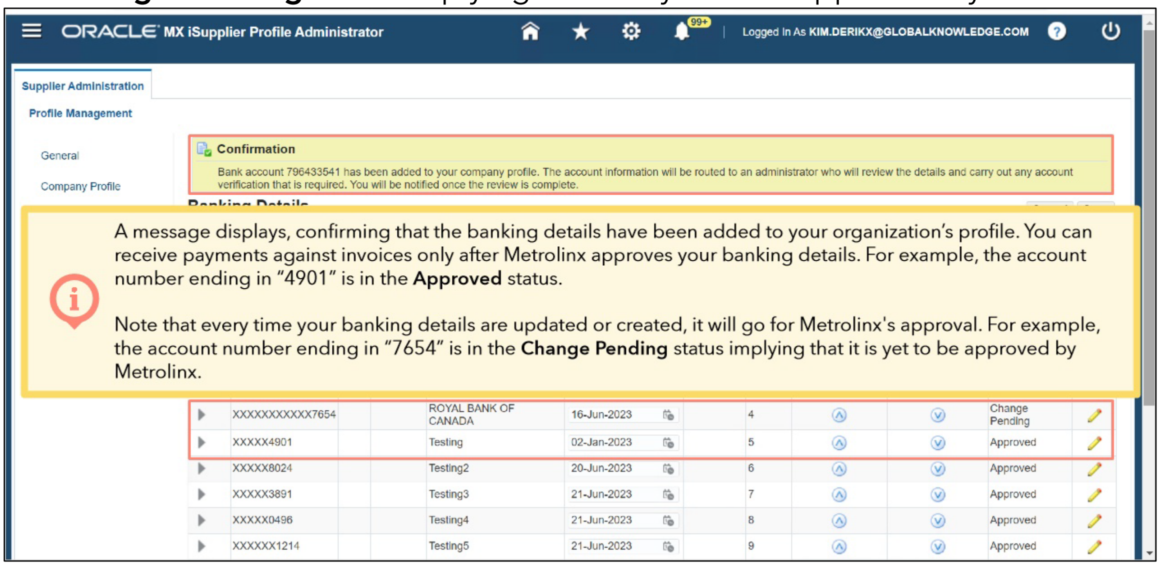


65. Click the **Save** button.

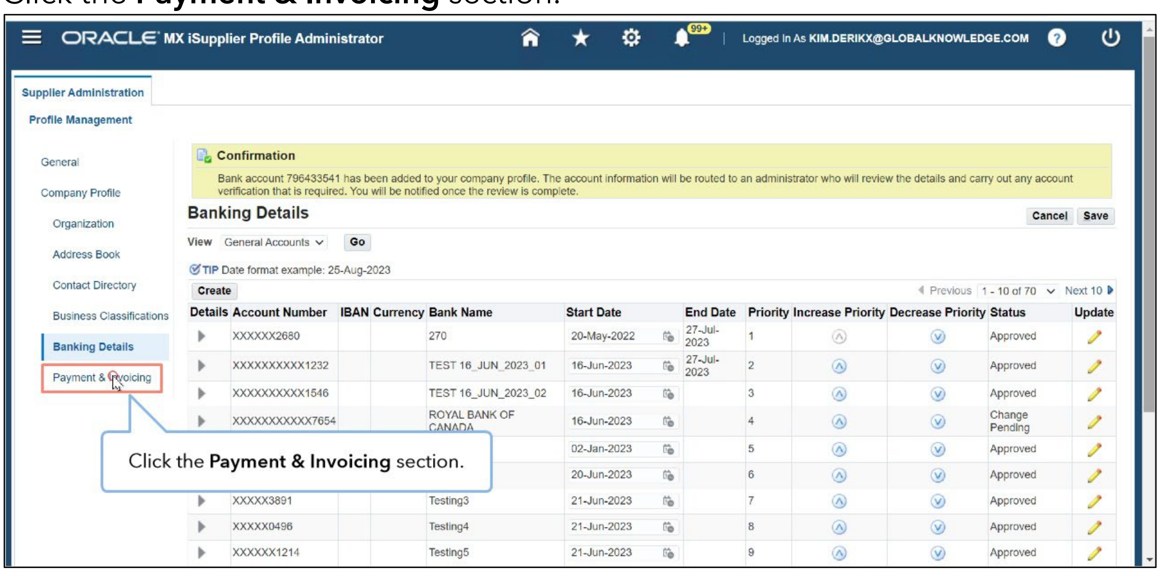


A message displays, confirming that the banking details have been added to your organization's profile. You can receive payments against invoices only after Metrolinx approves your banking details. For example, the account number ending in "4901" is in the **Approved** status.

Note that every time your banking details are updated or created, it will go for Metrolinx's approval. For example, the account number ending in "7654" is in the **Change Pending** status implying that it is yet to be approved by Metrolinx.

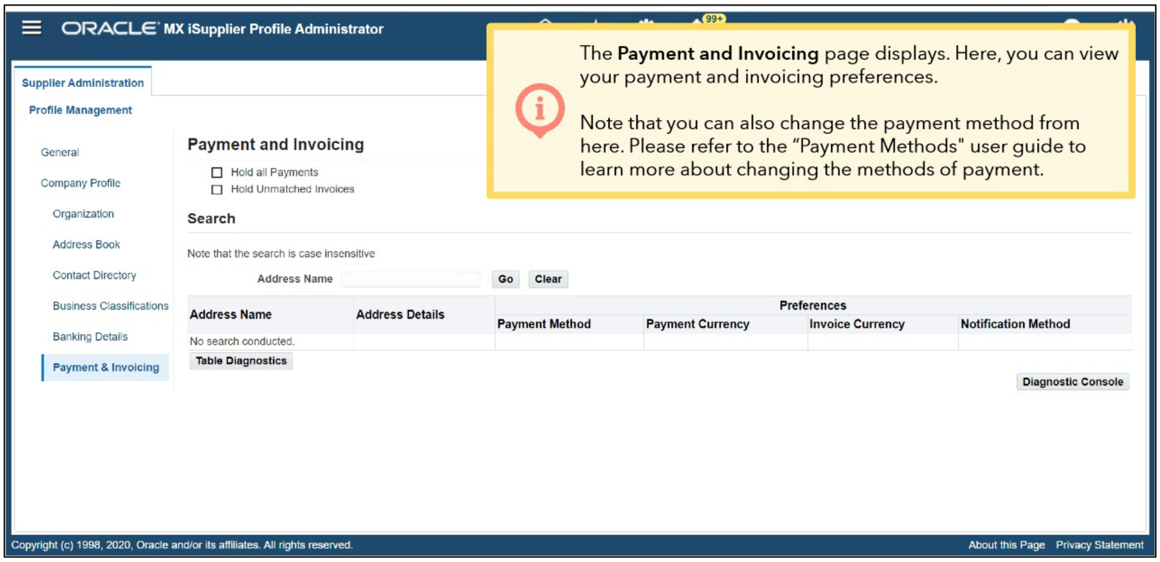


66. Click the **Payment & Invoicing** section.

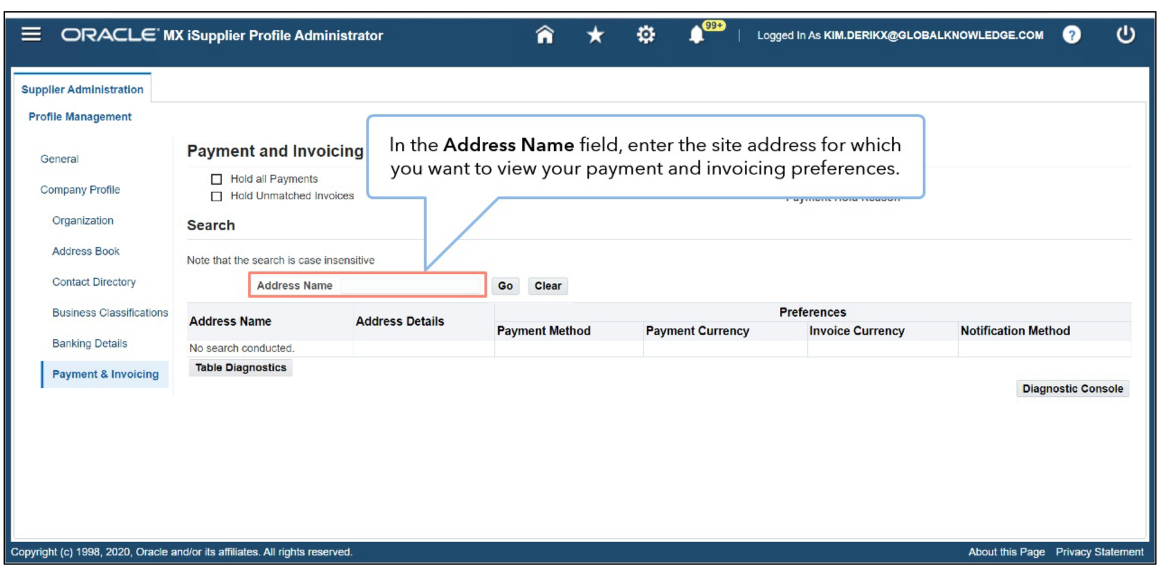


The **Payment and Invoicing** page displays. Here, you can view your payment and invoicing preferences.

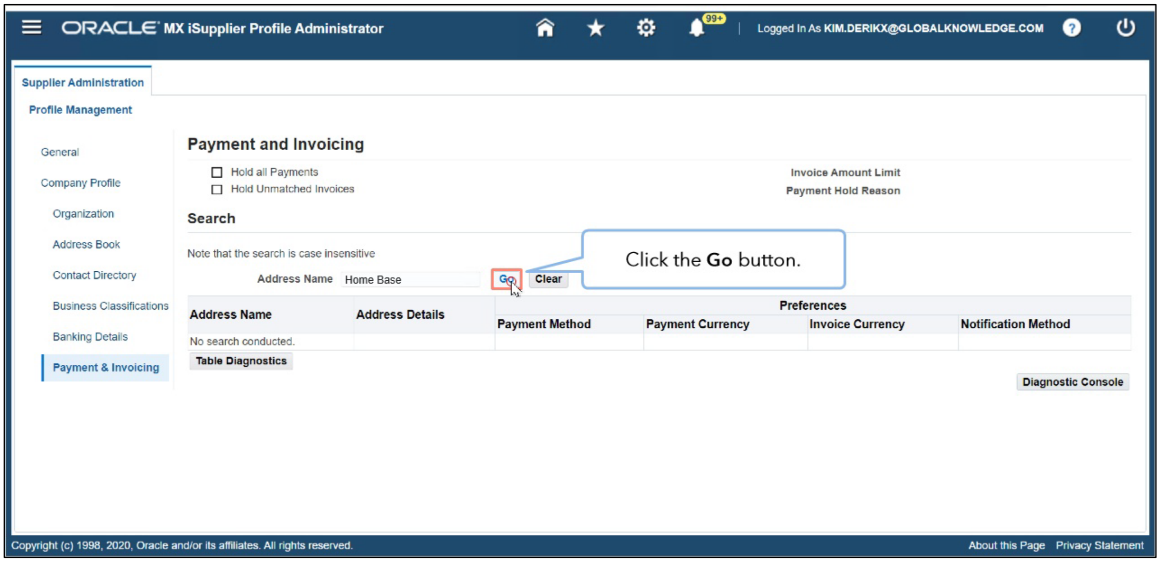
Note: You can also change the mode of payment from here. Please refer to the "Payment Methods" user guide to learn more about changing the mode of payment.



67. In the **Address Name** field, enter the site address for which you want to view your payment and invoicing preferences.



68. Click the **Go** button.



69. The search results are displayed. View the payment and invoicing details for the address in the following fields, such as **Payment Method**, **Payment Currency**, **Invoice Currency**, and **Notification Method**.