



New Vendor Registration

Version No: 1.0

Date: 08/09/2023

Overview

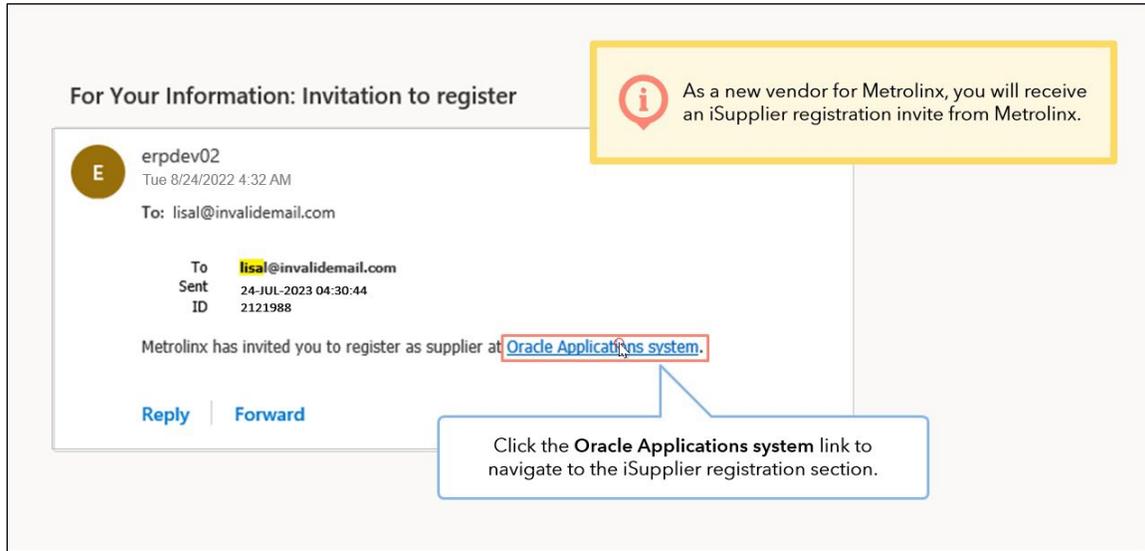
This document provides you the steps to register a new vendor.

New Vendor Registration

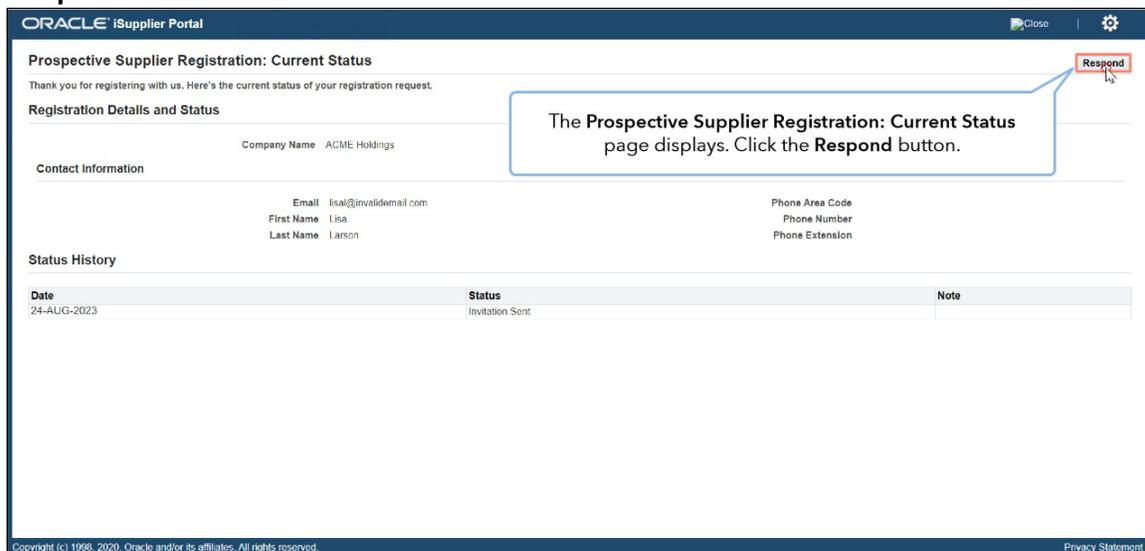
As a new vendor for Metrolinx, you will receive an iSupplier registration invite from Metrolinx.

Follow the steps below to register a new vendor:

1. Click the **Oracle Applications system** link to navigate to the iSupplier registration section.



2. The **Prospective Supplier Registration: Current Status** page displays. Click the **Respond** button.



3. The **Prospective Supplier Registration** page displays. Scroll down to view the complete list of fields.

ORACLE iSupplier Portal

Basic Information | Company Details | Attachments

Prospective Supplier Registration

Step 1 of 3 **Next**

* Indicates required field

TIP By registering in iSupplier, you agree to accept the following terms and conditions found at the link below.

[T & C](#)
[Supplier Registration - How to Doc/FAQ](#)
[Metrolinx - Privacy Policy](#)
Blank label for instruction text

Company Details

At least one tax id is required to be able to complete the registration request.

* **Company Name** ACME Holdings

Tax Country [dropdown]

Where provided, the tax country will be used to

Tax Registration Number [input]
Taxpayer ID [input]

DUNS Number [input]
SIN [input]

Social Insurance Number (SIN) collection is optional for independent contractors engaged by Metrolinx and is only used for tax reporting purposes if you have checked to have Metrolinx withhold and submit income taxes at source.

By using this portal, you represent and warrant that the information you enter will be your own and true and accurate information. Metrolinx uses this information for tax reporting purposes. Metrolinx is not responsible for the provision of any falsified, stolen or invalid information that may be provided by you. Metrolinx manages your personal information in accordance with our privacy policy: <https://www.metrolinx.com/en/privacy-policy>

Contact Information

Blank label for instruction text

Validate the information that Metrolinx has entered in the **Company Details** and **Contact Information** sections. You can update the details, as needed.

Note that you have received the invitation email because Metrolinx has identified you as a primary contact for your organization.

Metrolinx - Privacy Policy
Blank label for instruction text

Company Details

At least one tax id is required to be able to complete the registration request.

* **Company Name** ACME Holdings

Tax Country [dropdown]

Where provided, the tax country will be used to validate the format of the Tax Registration Number and/or Taxpayer ID.

Tax Registration Number [input]
Taxpayer ID [input]

DUNS Number [input]
SIN [input]

Social Insurance Number (SIN) collection is optional for independent contractors engaged by Metrolinx and is only used for tax reporting purposes if you have checked to have Metrolinx withhold and submit income taxes at source.

By using this portal, you represent and warrant that the information you enter will be your own and true and accurate information. Metrolinx uses this information for tax reporting purposes. Metrolinx is not responsible for the provision of any falsified, stolen or invalid information that may be provided by you. Metrolinx manages your personal information in accordance with our privacy policy: <https://www.metrolinx.com/en/privacy-policy>

Contact Information

Blank label for instruction text

* **Email** lisa@invalidomain.com

First Name Lisa
Last Name Larson

Phone Area Code [input]
Phone Number [input]
Phone Extension [input]

Step 1 of 3 **Next**

Enter the relevant details in the **Tax Country** field and in at least one of the following fields, such as **Tax Registration Number**, **Taxpayer ID** or **DUNS** Number.

Also, enter the relevant Social Insurance Number (SIN) in the **SIN** field. An error message will be displayed if the relevant SIN is not entered.

Please note that the Social Insurance Number (SIN) collection is not required for Trade Vendors and is optional for independent contractors engaged by Metrolinx. This information is only used for tax reporting purposes.

The screenshot shows the 'Company Details' section of the registration form. The 'Company Name' field is populated with 'ACME Holdings'. The 'Tax Country' field is empty. Below it, the 'Tax Registration Number', 'Taxpayer ID', 'DUNS Number', and 'SIN' fields are also empty. A yellow callout box with an information icon contains the following text: 'Enter the relevant details in the **Tax Country** field and in at least one of the following fields, such as **Tax Registration Number**, **Taxpayer ID** or **DUNS** Number. Also, enter the relevant Social Insurance Number (SIN) in the **SIN** field. An error message will be displayed if the relevant SIN is not entered. Please note that the Social Insurance Number (SIN) collection is not required for Trade Vendors and is optional for independent contractors engaged by Metrolinx. This information is only used for tax reporting purposes.' The 'Contact Information' section is partially visible at the bottom.

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

Scroll up.

The screenshot shows the 'Company Details' section of the registration form with the following fields populated: 'Company Name' (ACME Holdings), 'Tax Country' (Canada), 'Tax Registration Number' (402040810), and 'SIN' (048454298). A blue callout box with the text 'Scroll up.' points to the 'Tax Country' field. A yellow callout box with an information icon contains the text: 'In this demonstration, the relevant fields are populated for you.' The 'Contact Information' section is also visible, with fields for 'Last Name' (Larson), 'Phone Area Code', 'Phone Number', and 'Phone Extension'.

4. Click the **Next** button.

The **Prospective Supplier Registration: Additional Details** page displays.

Take a moment to read the **Note to Supplier** text which provides relevant information regarding the iSupplier registration process.

5. Enter any relevant messaging to Metrolinx in the **Note to Buyer** field.

Prospective Supplier Registration: Additional Details

Blank label for instruction text

Company Name: ACME Holdings
 Tax Country: Canada
 Tax Registration Number: 4020440810
 Taxpayer ID
 DUNS Number
 Alternate Supplier Name

Note to Buyer The details for ACME Holdings are entered in the relevant sections.

Note to Supplier Please review and update any details entered, as well as enter any required fields including your banking details. If appropriate, you will also be required to attach your articles of incorporation and proof of banking details, such as a void cheque. You can access resources on iSupplier on the Metrolinx iSupplier Resources page: metrolinx.com/iSupplier

Address Book

At least one entry is required.

| Address Name | Address Details | Purpose | Update | Delete |
|--------------|---|---------------------|--------|--------|
| Home Base | 432 Clover Street, Toronto M5C 2N5 Canada | Payment, Purchasing | | |

Contact Directory

At least one entry is required.

| First Name | Last Name | Phone | Email | Requires User Account | Update | Delete |
|------------|-----------|-------|----------------------|-------------------------------------|--------|--------|
| Lisa | Larson | | lisa@invalidmail.com | <input checked="" type="checkbox"/> | | |

6. Scroll down to view more details.

Prospective Supplier Registration: Additional Details

Blank label for instruction text

Company Name: ACME Holdings
 Tax Country: Canada
 Tax Registration Number: 4020440810
 Taxpayer ID
 DUNS Number
 Alternate Supplier Name

Note to Buyer The details for ACME Holdings are entered in the relevant sections.

Note to Supplier Please review and update any details entered, as well as enter any required fields including your banking details. If appropriate, you will also be required to attach your articles of incorporation and proof of banking details, such as a void cheque. You can access resources on iSupplier on the Metrolinx iSupplier Resources page: metrolinx.com/iSupplier

Address Book

At least one entry is required.

| Address Name | Address Details | Purpose | Update | Delete |
|--------------|---|---------|--------|--------|
| Home Base | 432 Clover Street, Toronto M5C 2N5 Canada | | | |

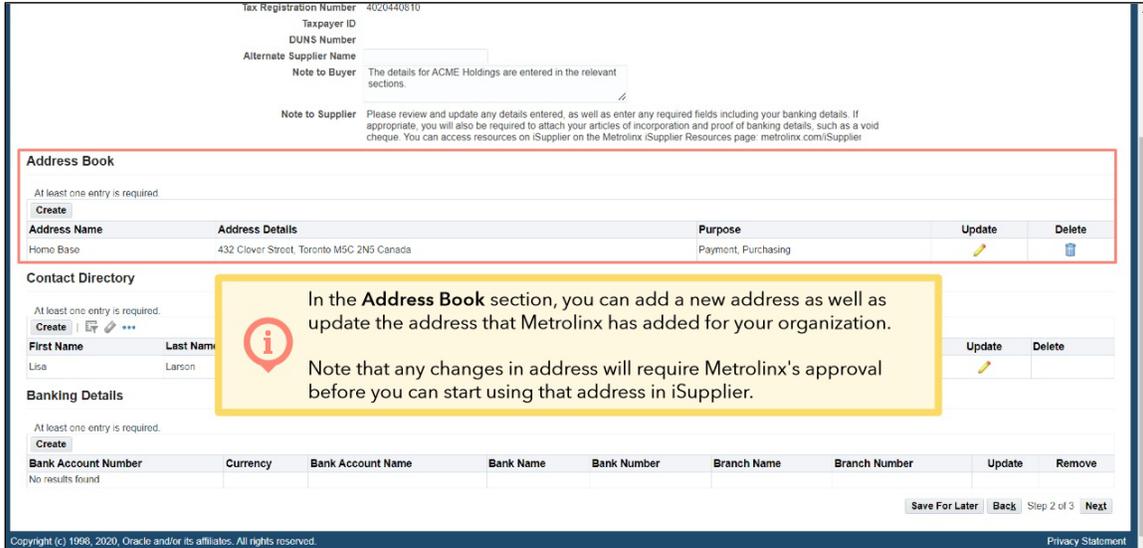
Contact Directory

At least one entry is required.

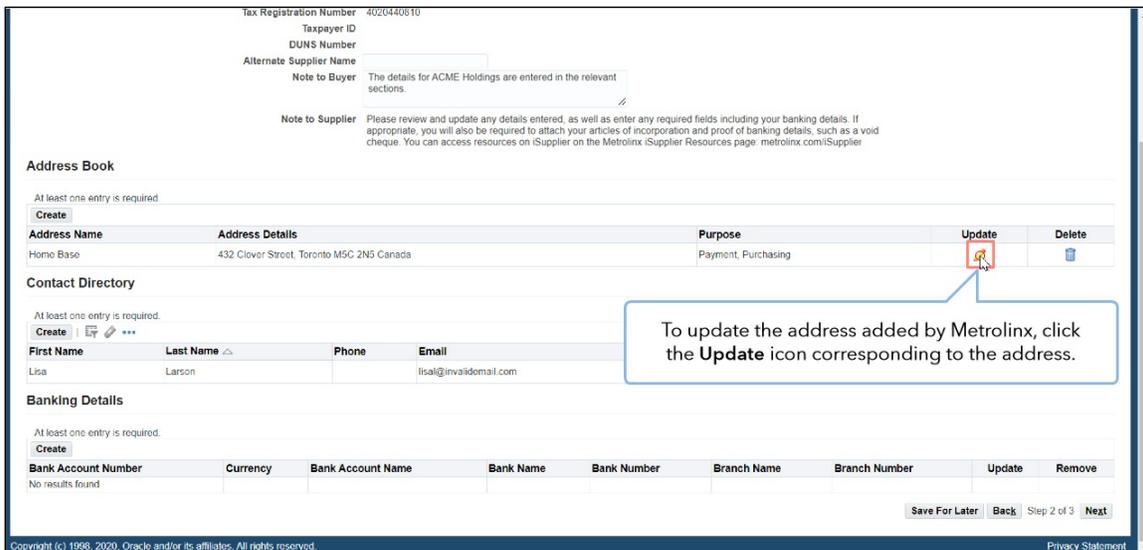
| First Name | Last Name | Phone | Email | Requires User Account | Update | Delete |
|------------|-----------|-------|----------------------|-------------------------------------|--------|--------|
| Lisa | Larson | | lisa@invalidmail.com | <input checked="" type="checkbox"/> | | |

In the **Address Book** section, you can add a new address as well as update the address that Metrolinx has added for your organization.

Note that any changes in address will require Metrolinx's approval before you can start using that address in iSupplier.



- To update the address added by Metrolinx, click the **Update** icon corresponding to the address.



The **Update Address** page displays. Here, you can validate the information that Metrolinx has added as well as enter new information in the relevant fields.

Update Address

* Indicates required field

Return to Prospective Supplier Registration: Additional Details

Country: Canada

* Address Name: Home Base

* Address Line 1: 432 Clover Street

Address Line 2:

Address Line 3:

Address Line 4:

City: Toronto

County:

State:

Province: ON

Postal Code: M5G 2N5

Phone Area Code:

Phone Number:

Fax Area Code:

Fax Number:

Email Address:

Purchasing Address

Payment Address

RFQ Only Address

Address Purpose

+ No results found

Copyright (c) 1998, 2020, Oracle and/or its affiliates. All rights reserved. Privacy Statement

In this demonstration, we have added a phone number for this address in the **Phone Number** field.

Update Address

* Indicates required field

Return to Prospective Supplier Registration: Additional Details

Country: Canada

* Address Name: Home Base

* Address Line 1: 432 Clover Street

Address Line 2:

Address Line 3:

Address Line 4:

City: Toronto

County:

State:

Province: ON

Postal Code: M5G 2N5

Phone Area Code:

Phone Number: 416-555-1234

Fax Area Code:

Fax Number:

Email Address:

Purchasing Address

Payment Address

RFQ Only Address

Address Purpose

+ No results found

Remove

Copyright (c) 1998, 2020, Oracle and/or its affiliates. All rights reserved. Privacy Statement

- Click the **Return to Prospective Supplier Registration: Additional Details** button to go back.

ORACLE iSupplier Portal

Update Address

* Indicates required field

[Return to Prospective Supplier Registration: Additional Details](#)

Country: Canada

Address Name: Home Base
Address Line 1: Lower Street
Address Line 2:
Address Line 3:

Phone Area Code: 416-555-1234
Phone Number:
Fax Area Code:
Fax Number:

Purchasing Address
 Payment Address
 RFQ Only Address

Postal Code: M5C 2N5

Address Purpose

| Purpose | Remove |
|------------------|--------|
| No results found | |

Copyright (c) 1996, 2020, Oracle and/or its affiliates. All rights reserved. Privacy Statement

The **Address Book** is automatically updated and reflects the phone number you have just added.

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

ORACLE iSupplier Portal

Basic Information | **Company Details** | Attachments

Prospective Supplier Registration: Additional Details Save For Later Back Step 2 of 3 Next

Blank label for instruction text

Company Name: ACME Holdings
Tax Country:
Tax Registration Number: 4020440810
Taxpayer ID:
DUNS Number:
Alternate Supplier Name:
Note to Buyer: The details for ACME Holdings are entered in the relevant sections.

Address Book

At least one entry is required.

[Create](#)

| Address Name | Address Details | Update | Delete |
|--------------|----------------------------|--------|--------|
| Home Base | 432 Clever Street, Toronto | | |

Contact Directory

At least one entry is required.

[Create](#)

| First Name | Last Name | Phone | Email | Requires User Account | Update | Delete |
|------------|-----------|--------------|-----------------------|--------------------------|--------|--------|
| Lisa | Larson | 416-555-1234 | lisa@invalidemail.com | <input type="checkbox"/> | | |

ids including your banking details. If it is proof of banking details, such as a void purposes page: metrolinx.com/Supplier

10. 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**.

ORACLE iSupplier Portal

Create Address

* Indicates required field

Country: Canada

* Address Name

* Address Line 1

Address Line 2

Address Line 3

Address Line 4

City

County

State

Province

Postal Code

Address Purpose

+ Purpose: No results found. Remove

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.

RFQ Only Address

Cancel Apply

Copyright (c) 1998, 2020, Oracle and/or its affiliates. All rights reserved. Privacy Statement

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

ORACLE iSupplier Portal

Create Address

* Indicates required field

Country: Canada

* Address Name: Trade Building

* Address Line 1: 543 Pacific Street

Address Line 2

Address Line 3

Address Line 4

City: Toronto

County

State

Province: ON

Postal Code: M5C 9C6

Phone Area Code

Phone Number

Fax Area Code

Fax Number

Email Address

Purchasing Address

Payment Address

RFQ Only Address

Address Purpose

+ Purpose: No results found. Remove

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

Cancel Apply

Copyright (c) 1998, 2020, Oracle and/or its affiliates. All rights reserved. Privacy Statement

You need to select the business purpose for which the new address will be used.

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.

11. Clear the **RFQ Only Address** check box since your organization has already been selected as a vendor.

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

ORACLE iSupplier Portal Close Settings

Create Address Cancel Apply

* Indicates required field

Country: Canada

* Address Name: Trade Building

* Address Line 1: 543 Pacific Street

Address Line 2:

Address Line 3:

Address Line 4:

City: Toronto

Phone Area Code:

Phone Number:

Fax Area Code:

Fax Number:

Email Address:

Purchasing Address

Payment Address

RFQ Only Address

Postal Code: M5C 9C6

Address Purpose

| Purpose | Remove |
|-------------------|--------|
| No results found. | |

Copyright (c) 1998, 2020, Oracle and/or its affiliates. All rights reserved. Privacy Statement

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

ORACLE iSupplier Portal Close Settings

Create Address Cancel Apply

* Indicates required field

Country: Canada

* Address Name: Trade Building

* Address Line 1: 543 Pacific Street

Address Line 2:

Address Line 3:

Address Line 4:

Province: ON

Postal Code: M5C 9C6

Phone Area Code:

Phone Number:

Fax Area Code:

Fax Number:

Email Address:

Purchasing Address

Payment Address

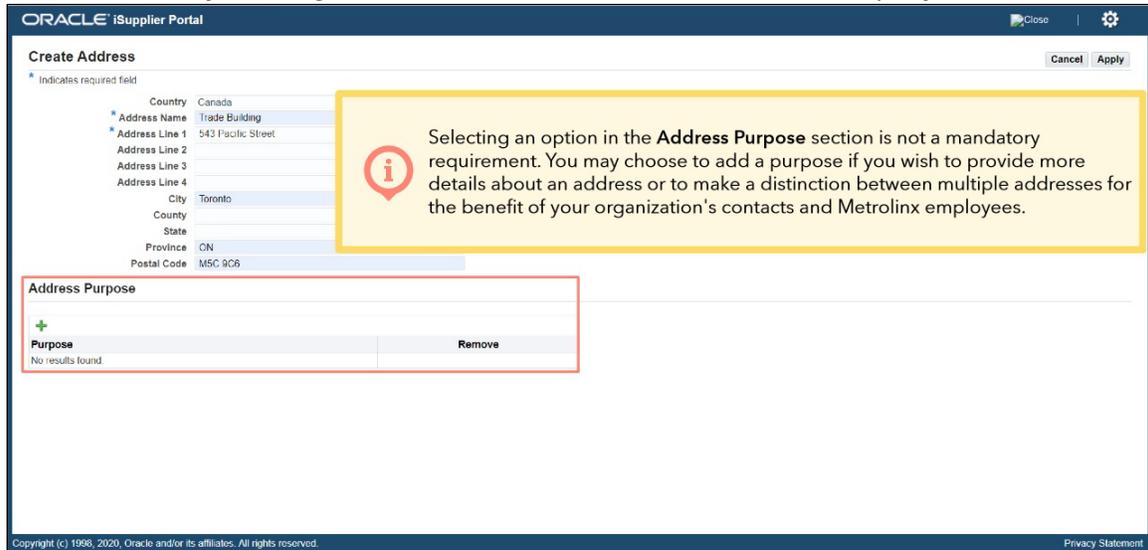
RFQ Only Address

Address Purpose

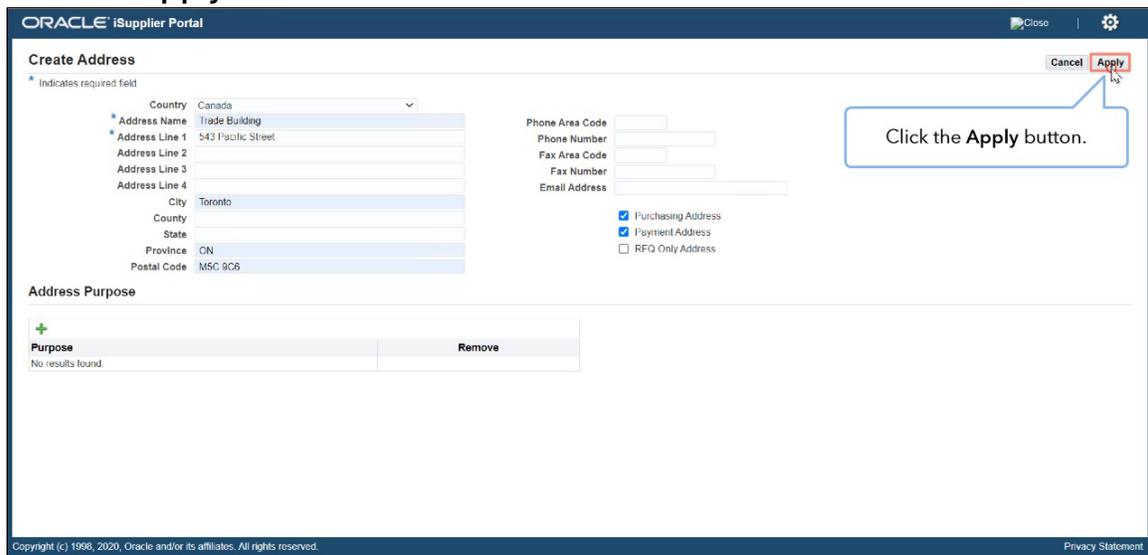
| Purpose | Remove |
|-------------------|--------|
| No results found. | |

Copyright (c) 1998, 2020, Oracle and/or its affiliates. All rights reserved. Privacy Statement

Selecting an option in the **Address Purpose** section 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.



14. Click the **Apply** button.



The new address is saved in the **Address Book** section.

Prospective Supplier Registration: Additional Details

Company Name: ACME Holdings
 Tax Country: [Blank]
 Tax Registration Number: 4020440810
 Taxpayer ID: [Blank]
 DUNS Number: [Blank]
 Alternate Supplier Name: [Blank]

Address Book

At least one entry is required.

| Address Name | Address Details | Purpose | Update | Delete |
|----------------|--|---------------------|----------|---------|
| Home Base | 432 Clover Street, Toronto M5C 2N5 Canada | Payment, Purchasing | [Pencil] | [Trash] |
| Trade Building | 543 Pacific Street, Toronto M5C 9C9 Canada | Payment, Purchasing | [Pencil] | [Trash] |

Contact Directory

At least one entry is required.

| First Name | Last Name | Phone | Email | Requires User Account | Update | Delete |
|------------|-----------|---------|---------|-----------------------|----------|---------|
| [Blank] | [Blank] | [Blank] | [Blank] | [Blank] | [Pencil] | [Trash] |

15. Scroll down to view more details.

Prospective Supplier Registration: Additional Details

Company Name: ACME Holdings
 Tax Country: [Blank]
 Tax Registration Number: 4020440810
 Taxpayer ID: [Blank]
 DUNS Number: [Blank]
 Alternate Supplier Name: [Blank]

Note to Buyer
 The details for ACME Holdings are entered in the relevant sections.

Note to Supplier
 Please review and update any details entered, as well as enter any required fields including your banking details. If appropriate, you will also be required to attach your articles of incorporation and proof of banking details, such as a void cheque. You can access resources on iSupplier on the Metrolinx iSupplier Resources page: metrolinx.com/Supplier

Address Book

At least one entry is required.

| Address Name | Address Details | Purpose | Update | Delete |
|----------------|--|---------------------|----------|---------|
| Home Base | 432 Clover Street, Toronto M5C 2N5 Canada | Payment, Purchasing | [Pencil] | [Trash] |
| Trade Building | 543 Pacific Street, Toronto M5C 9C9 Canada | Payment, Purchasing | [Pencil] | [Trash] |

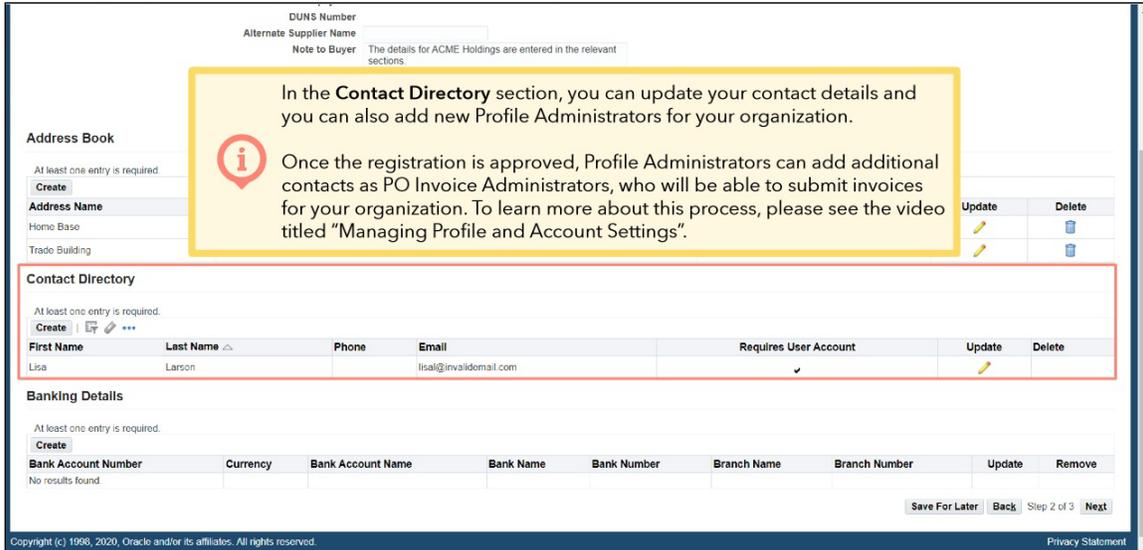
Contact Directory

At least one entry is required.

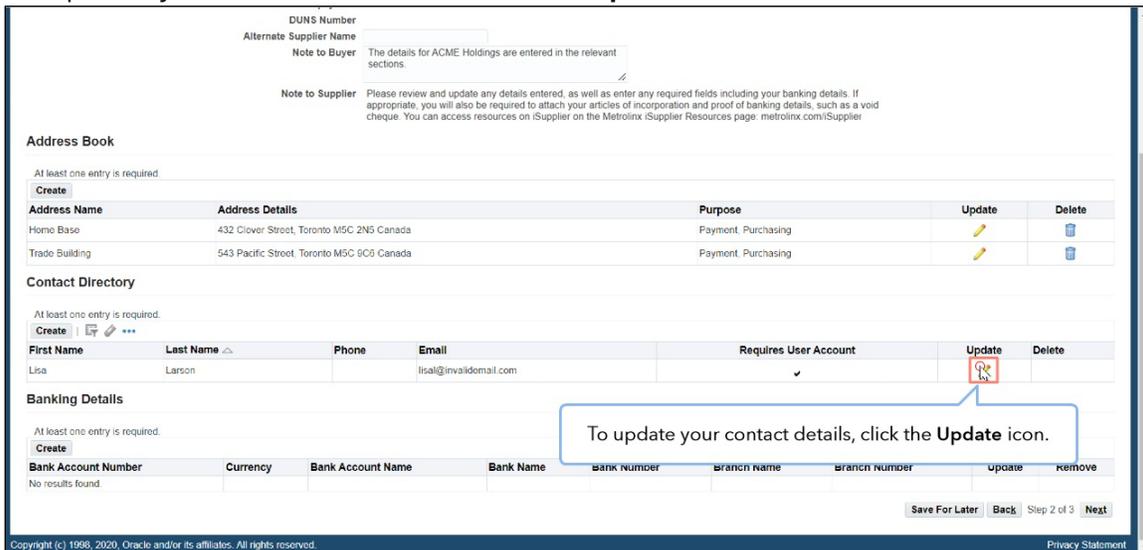
| First Name | Last Name | Phone | Email | Requires User Account | Update | Delete |
|------------|-----------|---------|---------|-----------------------|----------|---------|
| [Blank] | [Blank] | [Blank] | [Blank] | [Blank] | [Pencil] | [Trash] |

In the **Contact Directory** section, you can update your contact details and you can also add new Profile Administrators for your organization.

Once the registration is approved, Profile Administrators can add additional contacts as PO Invoice Administrators, who will be able to submit invoices for your organization. To learn more about this process, please see the video titled "Managing Profile and Account Settings".



16. To update your contact details, click the **Update** icon.



The **Update Contact** page displays. Here, you can validate the information populated by Metrolinx and update the fields, as needed.

In this demonstration, we have added a phone number in the **Phone Number** field.

17. Click the **Apply** button to save your updates.

Update Contact

* Indicates required field

Cancel **Apply**

Click the **Apply** button to save your updates.

Contact Title: [Dropdown]
 First Name: Lisa
 Middle Name: [Text]
 * Last Name: Larson
 Alternate Name: [Text]
 Job Title: [Text]
 Department: [Text]
 * Contact Email: lisa@invalidemail.com
 URL: [Text]

Phone Area Code: [Text]
 Phone Number: 416-555-7890
 Phone Extension: [Text]
 Alternate Phone Area Code: [Text]
 Alternate Phone Number: [Text]
 Fax Area Code: [Text]
 Fax Number: [Text]

Contact Purpose

+ [Add] [Remove]
 Purpose: No results found

Supplier User Account

Create User Account For The Contact

Addresses For the Contact

+ [Add] [Edit] [Remove]
 Address Name: [Text] Address Details: [Text] Remove: [Text]

18. The **Prospective Supplier Registration: Additional Details** page displays. Scroll down to view the **Contact Directory** section.

Prospective Supplier Registration: Additional Details

Basic Information | **Company Details** | Attachments

Save For Later | Back | Step 2 of 3 | Next

Blank label for instruction text.

Company Name: ACME Holdings
 Tax Country: [Text]
 Tax Registration Number: 4020440810
 Taxpayer ID: [Text]
 DUNS Number: [Text]
 Alternate Supplier Name: [Text]

Note to Buyer: The attachments and details for ACME Holdings are entered in the relevant sections.

Note to Supplier: Please review and update any details entered as w appropriate, you will also be required to attach your cheque. You can access resources on iSupplier on

Address Book

At least one entry is required.

Create [Add] [Remove]

| Address Name | Address Details | Purpose | Update | Delete |
|----------------|--|---------------------|----------|---------|
| Homo Base | 432 Clover Street, Toronto M5C 2N5 Canada | Payment, Purchasing | [Pencil] | [Trash] |
| Trade Building | 543 Pacific Street, Toronto M5C 9C9 Canada | Payment, Purchasing | [Pencil] | [Trash] |

Contact Directory

At least one entry is required.

Create [Add] [Remove]

| First Name | Last Name | Phone | Email | Requires User Account | Update | Delete |
|------------|-----------|--------|--------|-----------------------|----------|---------|
| [Text] | [Text] | [Text] | [Text] | [Text] | [Pencil] | [Trash] |

The **Prospective Supplier Registration: Additional Details** page displays. Scroll down to view the **Contact Directory** section.

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

Company Name ACME Holdings
 Tax Country
 Tax Registration Number 4020440810
 Taxpayer ID
 DUNS Number
 Alternate Supplier Name
 Note to Buyer The details for ACME Holdings are entered in the relevant sections.
 Note to Supplier Please review and update any details entered, as well as enter any required fields including your banking details. If appropriate, you will also be required to attach your articles of incorporation and proof of banking details, such as a void cheque. You can access resources on iSupplier on the Metrolinx iSupplier Resources page: metrolinx.com/iSupplier

Address Book
 At least one entry is required.
 Create

| Address Name | Address Details | Purpose | Update | Delete |
|--------------|-----------------|--------------------|--------|--------|
| | | Payment Purchasing | | |
| | | Payment Purchasing | | |

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

Contact Directory
 At least one entry is required.
 Create

| First Name | Last Name | Phone | Email | Requires User Account | Update | Delete |
|------------|-----------|--------------|-----------------------|-----------------------|--------|--------|
| Lisa | Larson | 416 555 7890 | lisa@invalidemail.com | ✓ | | |

Banking Details
 At least one entry is required.
 Create

| Bank Account Number | Currency | Bank Account Name | Bank Name | Bank Number | Branch Name | Branch Number | Update | Remove |
|---------------------|----------|-------------------|-----------|-------------|-------------|---------------|--------|--------|
| No results found. | | | | | | | | |

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

ORACLE iSupplier Portal Create Contact
 * Indicates required field

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

Contact Title
 First Name
 Middle Name
 * Last Name
 Alternate Name
 Job Title
 Department
 Contact Email
 URL

Phone Area Code
 Phone Number
 Phone Extension
 Alternate Phone Area Code
 Alternate Phone Number
 Fax Area Code
 Fax Number

Contact Purpose
 +
 Purpose Remove
 No results found.

Supplier User Account
 Create User Account For The Contact

Addresses For the Contact
 +
 Address Name Address Details Remove

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

ORACLE iSupplier Portal

Create Contact

* Indicates required field

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

Contact Title

First Name Bob

Middle Name

* Last Name Burns

Alternate Name

Job Title

Department

Contact Email bobbi@invalidemail.com

URL

Phone Area Code

Phone Number

Phone Extension

Alternate Phone Area Code

Alternate Phone Number

Fax Area Code

Fax Number

Contact Purpose

+ Purpose

No results found

Remove

Supplier User Account

Create User Account For The Contact

Addresses For the Contact

+ Address Name

Address Details

Remove

20. Select the **Create User Account For The Contact** check box.

ORACLE iSupplier Portal

Create Contact

* Indicates required field

Contact Title

First Name Bob

Middle Name

* Last Name Burns

Alternate Name

Job Title

Department

Contact Email bobbi@invalidemail.com

URL

Phone Area Code

Phone Number

Phone Extension

Alternate Phone Area Code

Alternate Phone Number

Fax Area Code

Fax Number

Contact Purpose

+ Purpose

No results found

Supplier User Account

Create User Account For The Contact

Addresses For the Contact

+ Address Name

Address Details

Remove

Select the Create User Account For The Contact check box.

Once you select the checkbox, a username is generated for the user account.

Note that the username defaults from the email address entered in the **Contact Email** field. This username is not editable. You need to contact Metrolinx to change the default username.

21. Scroll down to view more details.

In the **Addresses For the Contact** section, you can add the relevant addresses for a particular contact.

22. By adding an address for a contact, you can categorize your contacts as per their work location. Note that it is not mandatory to add addresses for a contact, nor will it restrict the contact to view information only for that address.

23. To add an address, click the **Plus** icon.

The screenshot shows a form with several sections: Contact Information, Contact Purpose, Supplier User Account, and Addresses For the Contact. The 'Addresses For the Contact' section has a table with columns for 'Address Name', 'Address Details', and 'Remove'. A plus icon is visible in the top left of this section. A blue callout box with a white background and a blue border points to the plus icon, containing the text: "To add an address, click the Plus icon."

24. Enter the name of the address in the **Address Name** field. The **Address Details** field is automatically populated based on the address name entered.

The screenshot shows the same form as above, but with the 'Supplier User Account' section expanded to show a checked checkbox for 'Create User Account For The Contact'. The 'Addresses For the Contact' section now has a text input field in the 'Address Name' column, which is highlighted with a red border. A yellow callout box with a white background and a yellow border contains an information icon and the text: "Enter the name of the address in the Address Name field. The Address Details field is automatically populated based on the address name entered."

25. In this demonstration, the relevant field are populated for you.

The screenshot shows a web form for vendor registration. The form is divided into several sections: Contact Information, Contact Purpose, Supplier User Account, and Addresses For the Contact. The Contact Information section contains fields for Contact Title, First Name (populated with 'Bob'), Middle Name, Last Name (populated with 'Burns'), Alternate Name, Job Title, Department, Contact Email (populated with 'bobb@invalidmail.com'), and URL. The Contact Purpose section has a 'Purpose' field with 'No results found' and a 'Remove' button. The Supplier User Account section has a checked checkbox for 'Create User Account For The Contact'. The Addresses For the Contact section has a table with one row: 'Trade Building' with address '543 Pacific Street, Toronto M5C 9C5 CA'. A yellow callout box with an information icon and the text 'In this demonstration, the relevant field are populated for you.' is overlaid on the form.

| Address Name | Address Details | Remove |
|----------------|--|--------|
| Trade Building | 543 Pacific Street, Toronto M5C 9C5 CA | |

Cancel Apply

26. Click the **Apply** button.

This screenshot is identical to the previous one, but with a blue callout box pointing to the 'Apply' button in the bottom right corner of the 'Addresses For the Contact' section. The callout box contains the text 'Click the Apply button.' and a mouse cursor icon pointing at the 'Apply' button.

Click the Apply button.

27. Scroll down to view the **Contact Directory** section.

Prospective Supplier Registration: Additional Details

Company Name: ACME Holdings
 Tax Country: [blank]
 Tax Registration Number: 4020440810
 Taxpayer ID: [blank]
 DUNS Number: [blank]
 Alternate Supplier Name: [blank]

Address Book

| Address Name | Address Details | Purpose | Update | Delete |
|----------------|--|---------|--------|--------|
| Homo Base | 432 Clover Street, Toronto M5G 2N5 Canada | | | |
| Trade Building | 543 Pacific Street, Toronto M5G 0G9 Canada | | | |

Contact Directory

| First Name | Last Name | Phone | Email | Requires User Account | Update | Delete |
|------------|-----------|-------|-------|-----------------------|--------|--------|
| | | | | | | |

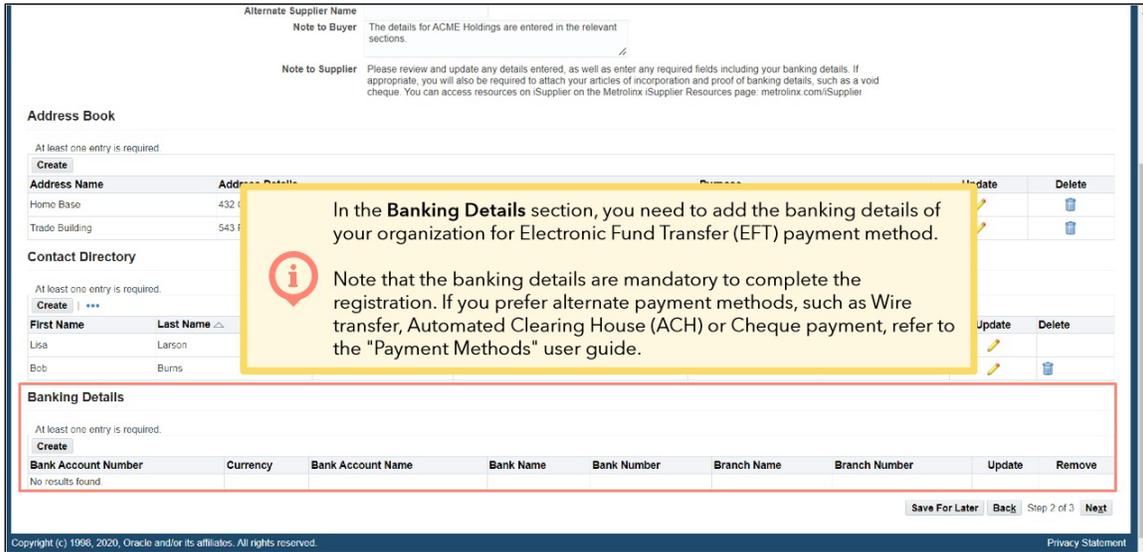
The new contact is saved in the **Contact Directory** section. The check mark in the **Requires User Account** column corresponding to a contact indicates that the contact requires an iSupplier user account.

Contact Directory

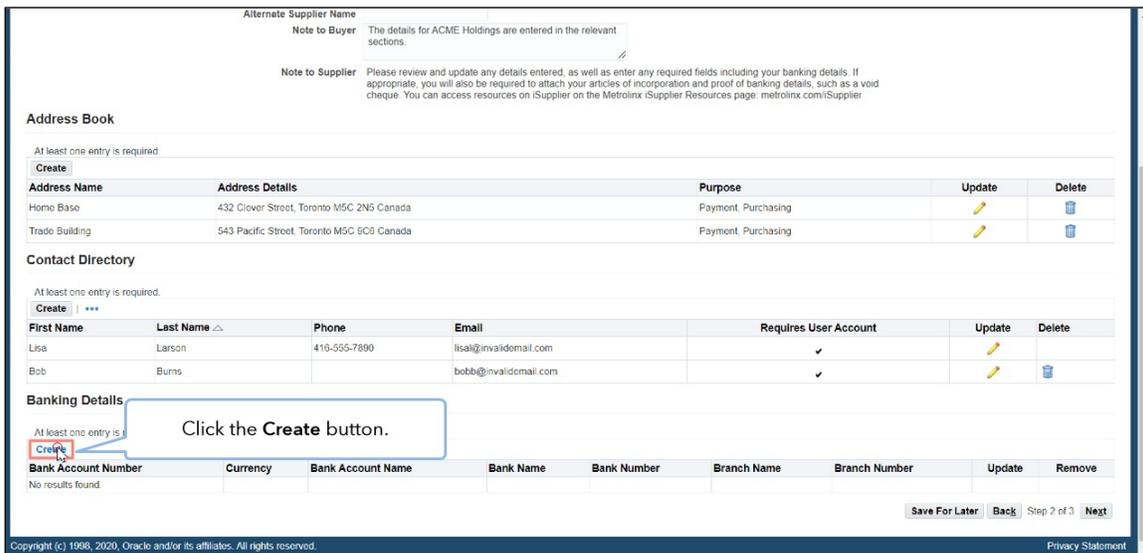
| First Name | Last Name | Phone | Email | Requires User Account | Update | Delete |
|------------|-----------|--------------|------------------------|-----------------------|--------|--------|
| Lisa | Larson | 416-555-7890 | lisa@invalidemail.com | ✓ | | |
| Bob | Burns | | bobbb@invalidemail.com | ✓ | | |

In the **Banking Details** section, you need to add the banking details for your organization.

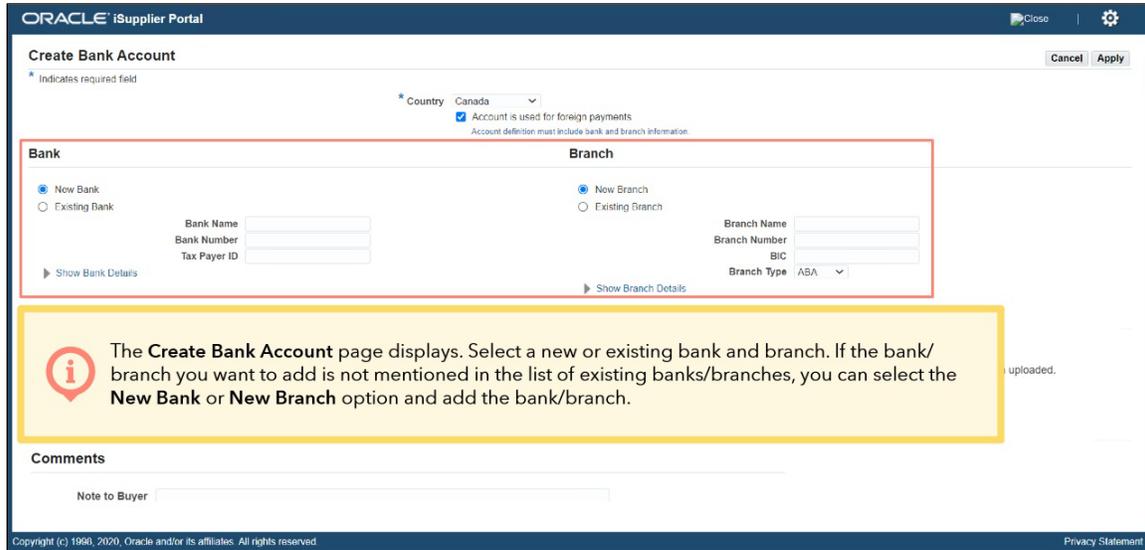
Note that banking details are mandatory to complete the registration. If you prefer alternate payment methods, such as Wire Transfer, Automated Clearing House (ACH), or Cheque payment, refer to the "Payment Method" user guide.



28. Click the **Create** button.

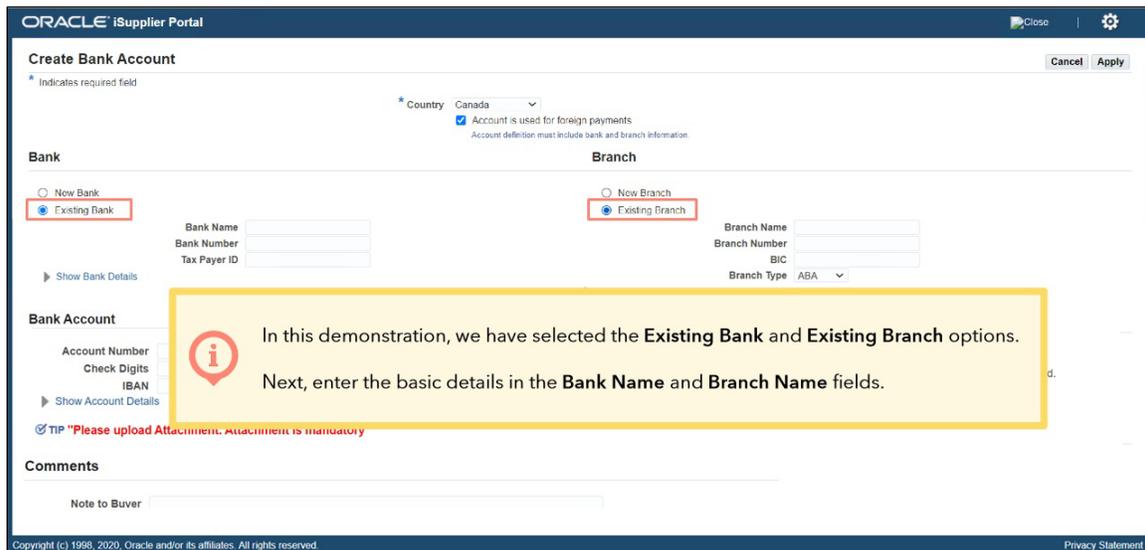


The **Create Bank Account** page displays. Select a new or existing bank and branch. If the bank/branch you want to add is not mentioned in the list of existing banks/branches, you can select the **New Bank** or **New Branch** option and add the bank/branch.



In this demonstration, we have selected the **Existing Bank** and **Existing Branch** options.

Next, enter the basic details in the **Bank Name** and **Branch Name** fields.



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

Note that when you select the **Existing Bank** and **Existing Branch** radio buttons, the **Bank Number** and **Branch Number** fields are auto-populated based on the options selected in the **Bank Name** and **Branch Name** fields.

* Indicates required field

Country: Canada

Account is used for foreign payments
Account definitions must include bank and branch information

Bank **Branch**

New Bank New Branch

Existing Bank Existing Branch

Bank Name: Bank of Montreal | Branch Name: Main Branch

Bank Number: 001 | Branch Number: 00022

Tax Payer ID: | BIC: | Branch Type: ABA

Show Bank Details | Show Branch Details

Bank Account

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

Note that when you select the **Existing Bank** and **Existing Branch** radio buttons, the **Bank Number** and **Branch Number** fields are auto-populated based on the options selected in the **Bank Name** and **Branch Name** fields.

Comments

Note to Buyer: [Text Area]

29. Enter the relevant details in the **Account Number**, **Account Name** and **Currency** fields.

* Indicates required field

Country: Canada

Account is used for foreign payments
Account definitions must include bank and branch information

Bank **Branch**

New Bank New Branch

Existing Bank Existing Branch

Bank Name: Bank of Montreal | Branch Name: Main Branch

Bank Number: 001 | Branch Number: 00022

Tax Payer ID: | BIC: | Branch Type: ABA

Show Bank Details | Show Branch Details

Bank Account

Account Number: [Text Field] | Account Name: [Text Field] | Currency: [Dropdown]

Check Digits: | IBAN: |

Show Account Details

TIP "Please upload Attachment. Attachment is mandatory"

Comments

Note to Buyer: [Text Area]

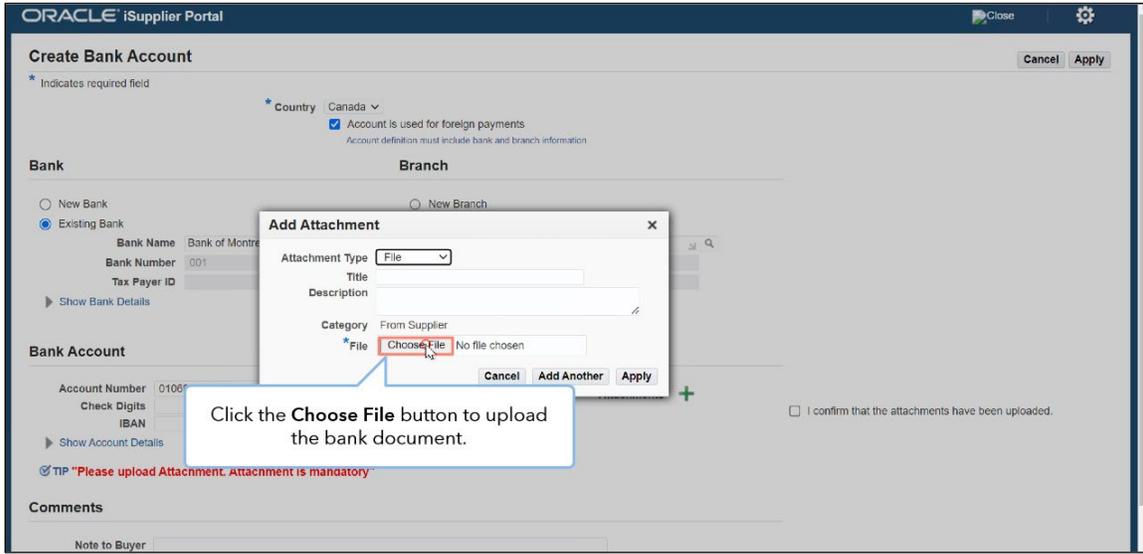
30. In this demonstration, the relevant fields are populated for you.

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

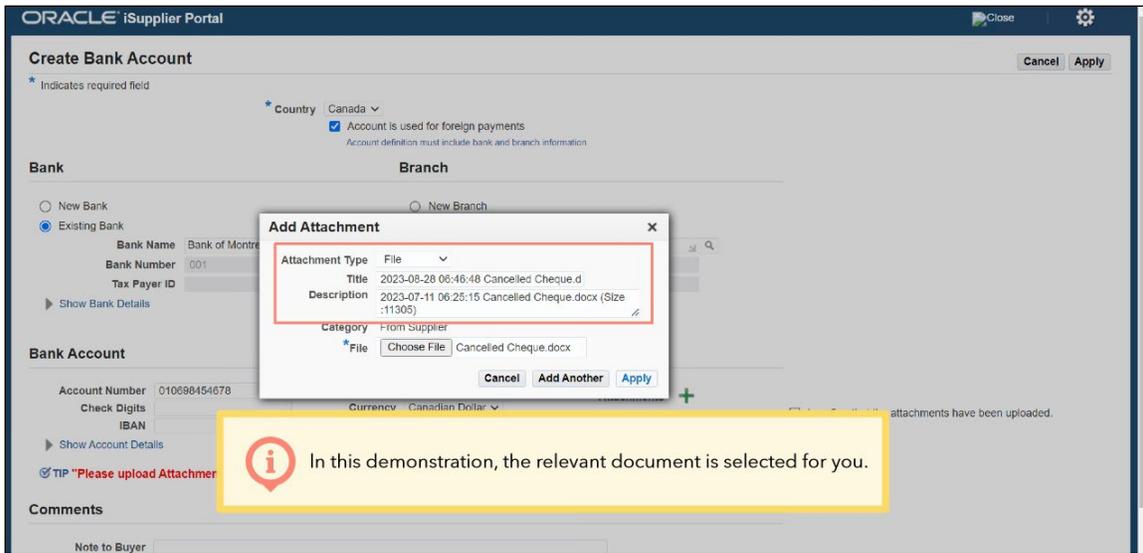
Note that Metrolinx requires the supporting documents to be uploaded in order to review the newly added bank account.

31. Click the **Plus** icon to upload the relevant document for the banking details.

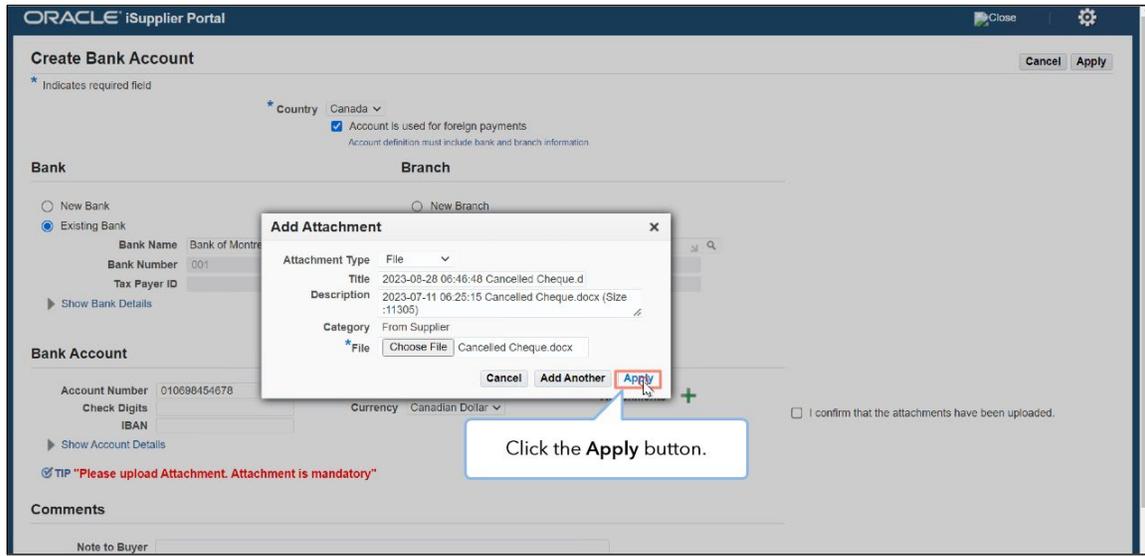
32. Click the **Choose File** button to upload the bank document.



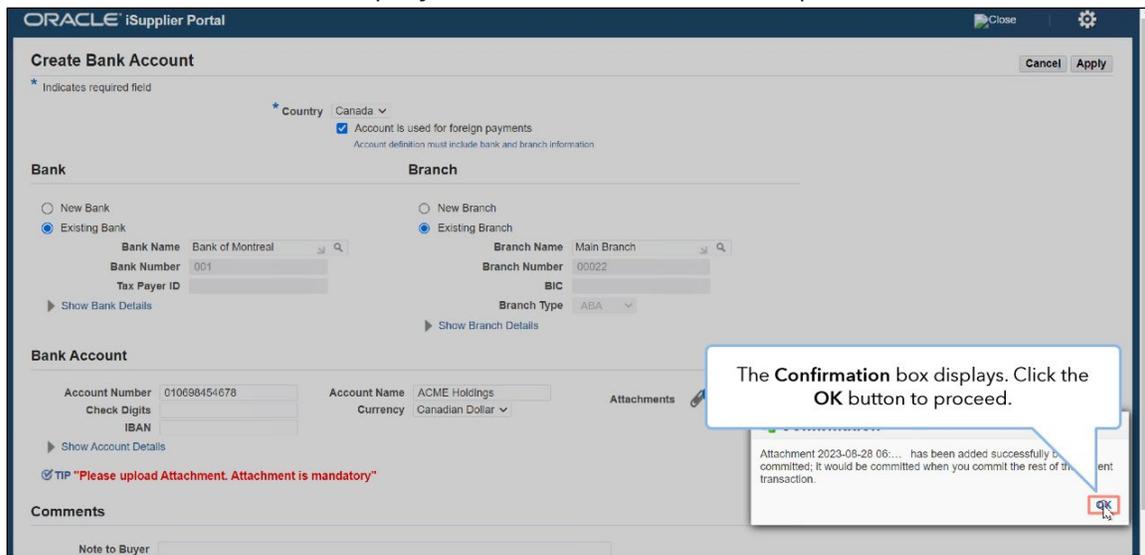
In this demonstration, the relevant document is selected for you.



33. Click the **Apply** button.



34. The **Confirmation** box displays. Click the **OK** button to proceed.



35. Select the checkbox to confirm that the attachments have been uploaded.

ORACLE iSupplier Portal

Create Bank Account Cancel Apply

* Indicates required field

Country: Canada

Account is used for foreign payments
Account definition must include bank and branch information

Bank **Branch**

New Bank Existing Bank

Bank Name: Bank of Montreal | Bank Number: 001 | Tax Payer ID: []

New Branch Existing Branch

Branch Name: Main Branch | Branch Number: 00022 | BIC: [] | Branch Type: ABA

Bank Account

Account Number: 010698454678 | Account Name: ACME Holdings | Currency: Canadian Dollar

Check Digits: [] | IBAN: []

Attachments: [] + I confirm that the attachments have been uploaded.

Comments

Note to Buyer: []

TIP "Please upload Attachment. Attachment is mandatory"

36. Enter any notes to Metrolinx in the **Note to Buyer** field, if necessary.

ORACLE iSupplier Portal

Create Bank Account Cancel Apply

* Indicates required field

Country: Canada

Account is used for foreign payments
Account definition must include bank and branch information

Bank **Branch**

New Bank Existing Bank

Bank Name: Bank of Montreal | Bank Number: 001 | Tax Payer ID: []

New Branch Existing Branch

Branch Name: Main Branch | Branch Number: 00022 | BIC: [] | Branch Type: ABA

Bank Account

Account Number: 010698454678 | Account Name: ACME Holdings | Currency: Canadian Dollar

Check Digits: [] | IBAN: []

Attachments: [] + I confirm that the attachments have been uploaded.

Comments

Note to Buyer: This bank account is to be linked to both our Home Base and Trade Building addresses.

TIP "Please upload Attachment. Attachment is mandatory"

37. Scroll Up.

The screenshot shows a web form for adding a new bank account. At the top, there is a 'Country' dropdown set to 'Canada' and a checked checkbox for 'Account is used for foreign payments'. Below this are two main sections: 'Bank' and 'Branch'. The 'Bank' section has radio buttons for 'New Bank' and 'Existing Bank', with 'Existing Bank' selected. Fields include 'Bank Name' (Bank of Montreal), 'Bank Number' (001), and 'Tax Payer ID'. The 'Branch' section has radio buttons for 'New Branch' and 'Existing Branch', with 'Existing Branch' selected. Fields include 'Branch Name' (Main Branch), 'Branch Number' (00022), 'BIC', and 'Branch Type' (ABA). Below these is the 'Bank Account' section with fields for 'Account Number' (010698454678), 'Account Name' (ACME Holdings), 'Check Digits', 'IBAN', 'Currency' (Canadian Dollar), and 'Attachments'. A confirmation checkbox is checked: 'I confirm that the attachments have been uploaded.' A red tip message reads: 'TIP *Please upload Attachment. Attachment is mandatory*'. At the bottom is a 'Comments' section with a 'Note to Buyer' field containing the text: 'This bank account is to be linked to both our Home Base and Trade Building addresses.'

As part of the process of adding a new bank account, please ensure that you enter a note to the buyer specifying to which address(es) the banking information should be applied.

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. On successful receipt of payment, Metrolinx will send an email to you to inform about the approval of bank details.

38. Click the **Apply** button.

ORACLE iSupplier Portal Create Bank Account

* Indicates required field

* Country: Canada

Account is used for foreign payments
Account definition must include bank and branch information.

Bank **Branch**

New Bank Existing Bank

Bank Name: Bank of Montreal
Bank Number: 001
Tax Payer ID: [Field]

New Branch Existing Branch

Branch Name: Main Branch
Branch Number: 00022
BIC: [Field]
Branch Type: ABA

Bank Account

Account Number: 010698454678
Check Digits: [Field]
IBAN: [Field]

Account Name: ACME Holdings
Currency: Canadian Dollar

Attachments: 1 +

I confirm that the attachments have been uploaded.

TIP "Please upload Attachment. Attachment is mandatory"

Comments

Note to Buyer: This bank account is to be linked to both our Home Base and Trade Building addresses.

39. Scroll down to view the **Banking Details** section.

ORACLE iSupplier Portal Prospective Supplier Registration: Additional Details

Basic Information | **Company Details** | Attachments

Save For Later | Back | Step 2 of 3 | Next

Blank label for instruction text

Company Name: ACME Holdings
Tax Country: [Field]
Tax Registration Number: 4020440810
Taxpayer ID: [Field]
DUNS Number: [Field]
Alternate Supplier Name: [Field]

Note to Buyer: The details for ACME Holdings are entered in the relevant sections.

Note to Supplier: Please review and update any details entered, as well as enter any required fields including your banking details. If appropriate, you will also be required to attach your articles of incorporation and proof of banking details, such as a void cheque. You can access resources on iSupplier on the Metrolinx iSupplier Resources page: metrolinx.com/iSupplier

Address Book

At least one entry is required.

| Address Name | Address Details |
|----------------|--|
| Home Base | 432 Clover Street, Toronto M5C 2N5 Canada |
| Trade Building | 543 Pacific Street, Toronto M5C 9C9 Canada |

Contact Directory

At least one entry is required.

| First Name | Last Name | Phone | Email | Requires User Account | Update | Delete |
|------------|-----------|---------|---------|-----------------------|---------|---------|
| [Field] | [Field] | [Field] | [Field] | [Field] | [Field] | [Field] |

The banking details added are saved in the **Banking Details** section.

Note that a notification is sent to vendor when the banking detail change is in process.

Note to Buyer The details for ACME Holdings are entered in the relevant sections.

Note to Supplier Please review and update any details entered, as well as enter any required fields including your banking details. If appropriate, you will also be required to attach your articles of incorporation and proof of banking details, such as a void cheque. You can access resources on iSupplier on the Metrolinx iSupplier Resources page: metrolinx.com/iSupplier

Address Book

At least one entry is required.

Create

| Address Name | Address Details | Purpose | Update | Delete |
|----------------|--|--------------------|--------|--------|
| Home Base | 432 Clover Street, Toronto M5C 2N5 Canada | Payment Purchasing | | |
| Trade Building | 543 Pacific Street, Toronto M5C 9C8 Canada | Payment Purchasing | | |

Contact Directory

At least one entry is required.

Create

| First Name | Last Name | Update | Delete |
|------------|-----------|--------|--------|
| Lisa | Larson | | |
| Bob | Burns | | |

Banking Details

At least one entry is required.

Create

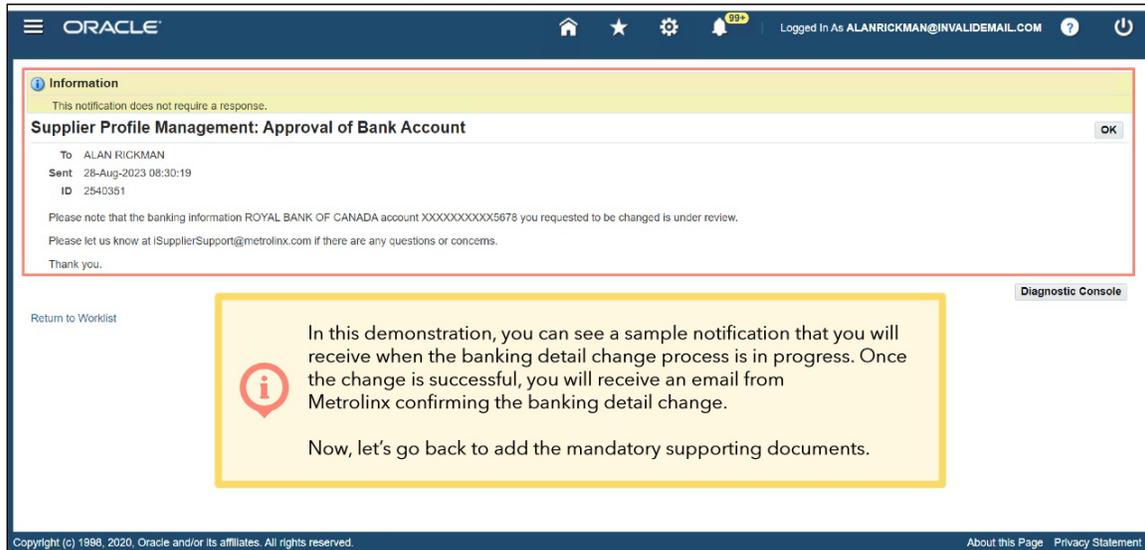
| Bank Account Number | Currency | Bank Account Name | Bank Name | Bank Number | Branch Name | Branch Number | Update | Remove |
|---------------------|-----------------|-------------------|------------------|-------------|-------------|---------------|--------|--------|
| 010098454678 | Canadian Dollar | ACME Holdings | Bank of Montreal | 001 | Main Branch | 00022 | | |

Save For Later **Back** Step 2 of 3 **Next**

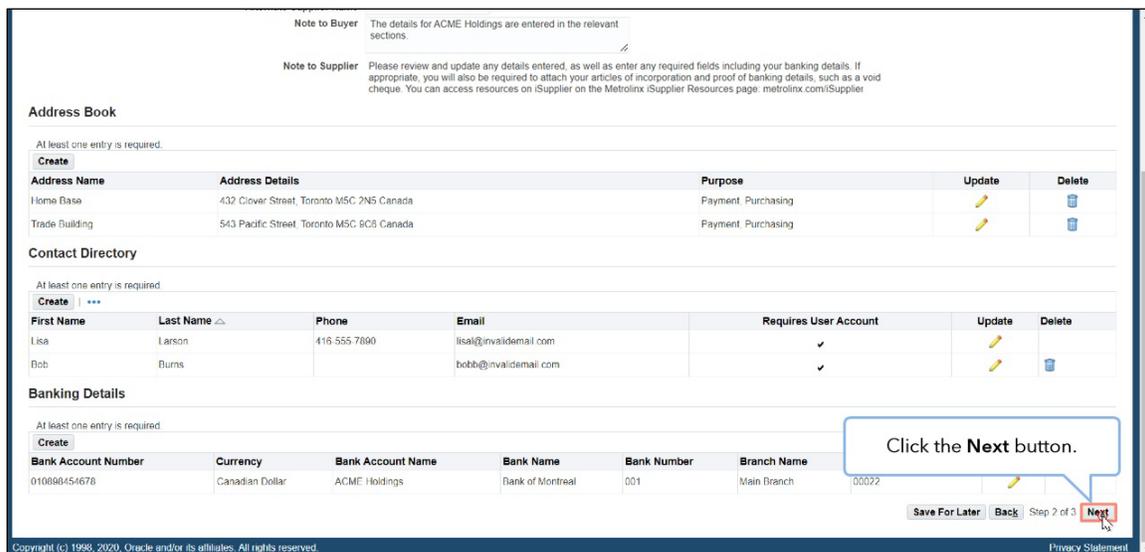
Copyright (c) 1998, 2020, Oracle and/or its affiliates. All rights reserved. Privacy Statement

In this demonstration, you can see a sample notification that the you will receive when the banking detail change process is in progress. Once the change is successful, you will receive an email from Metrolinx confirming the banking detail change.

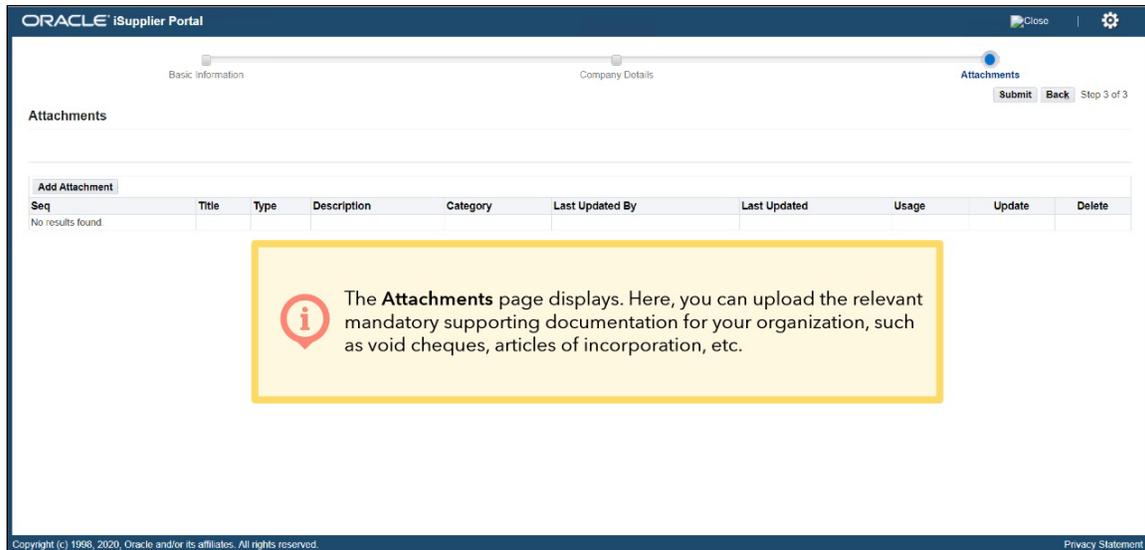
Now, let's go back to add the mandatory supporting documents.



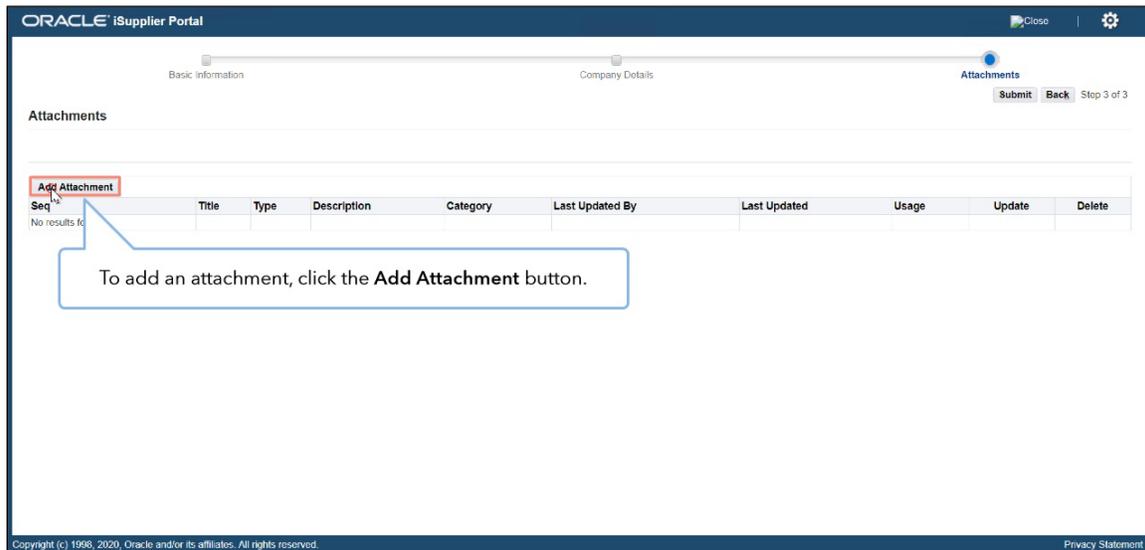
40. Click the **Next** button.



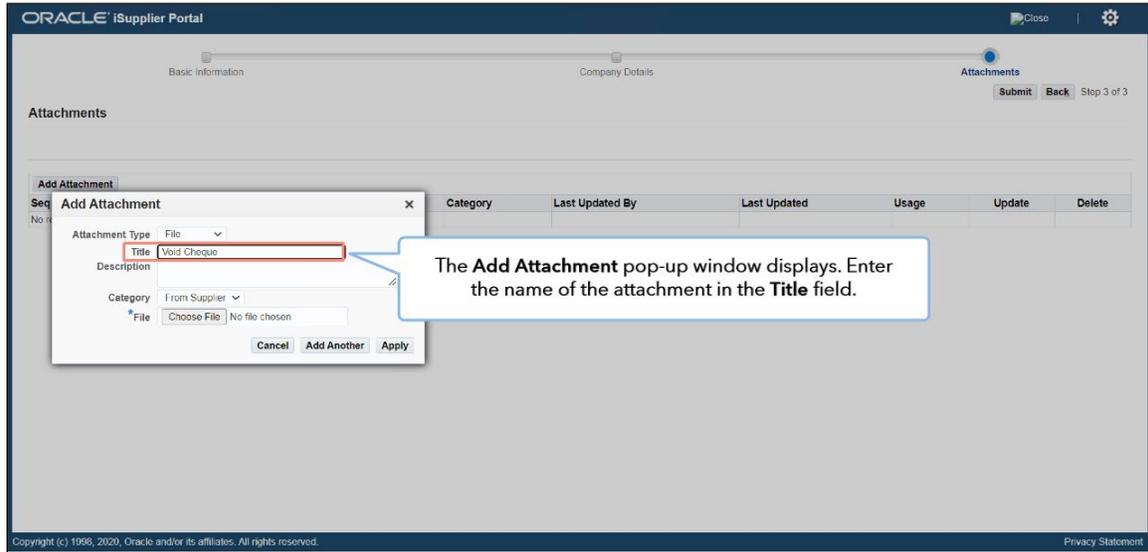
The **Attachments** page displays. Here, you can upload the relevant mandatory supporting documentation for your organization, such as void cheques, articles of incorporation, etc.



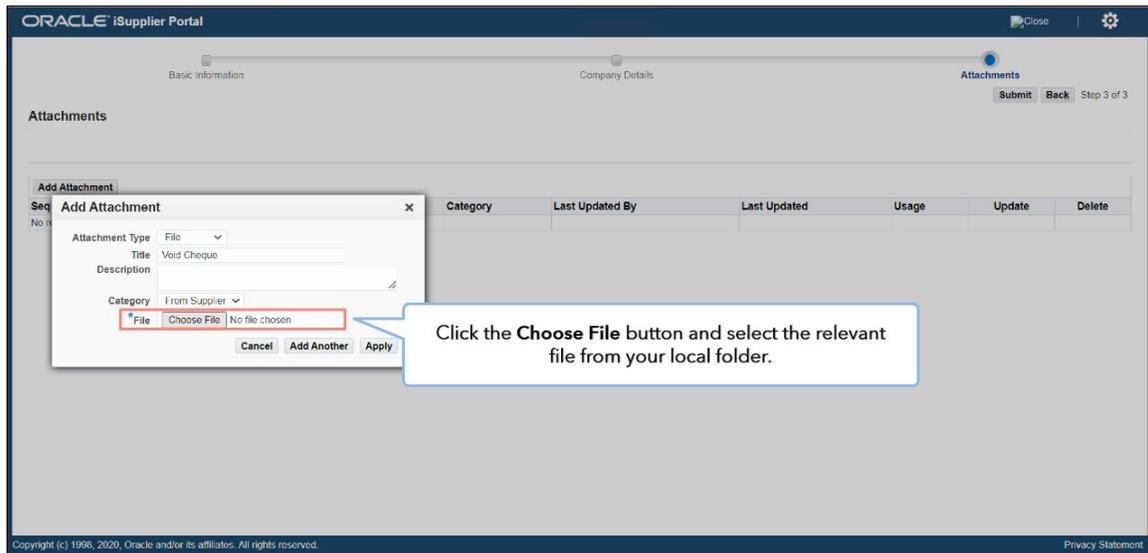
41. To add an attachment, click the **Add Attachment** button.



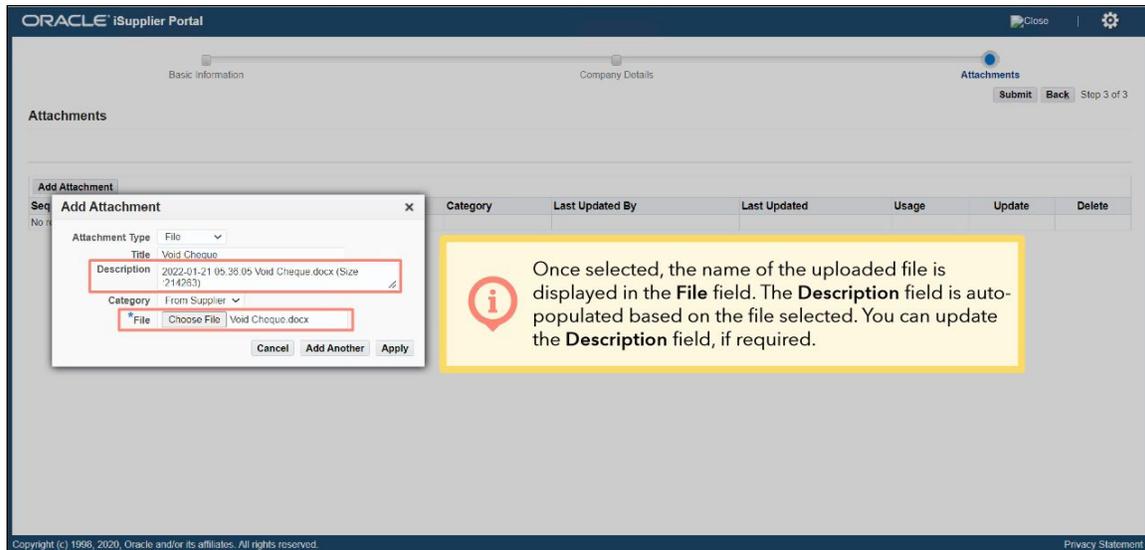
42. The **Add Attachment** pop-up window displays. Enter the name of the attachment in the **Title** field.



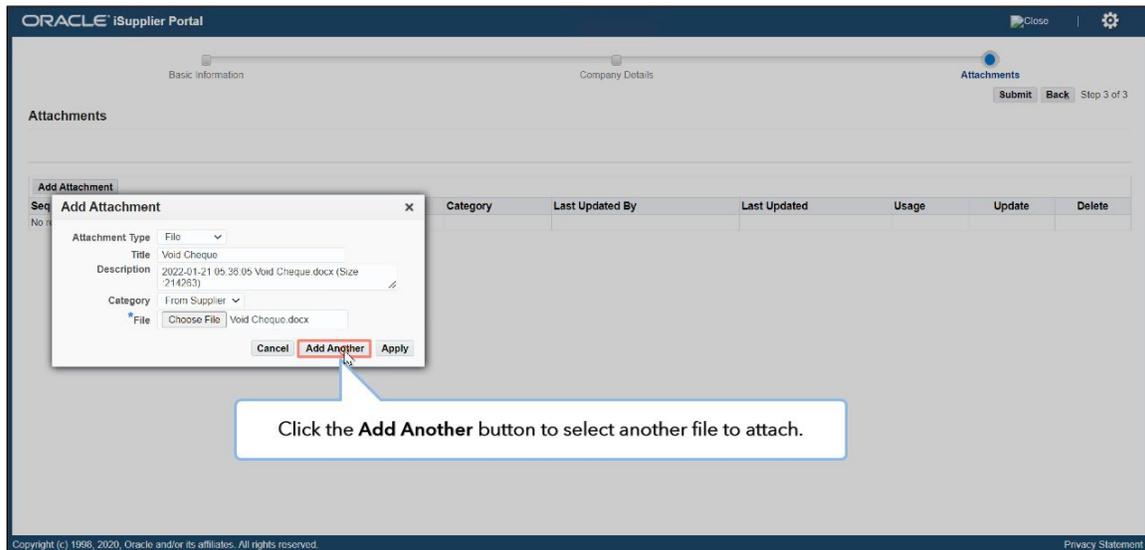
43. Click the **Choose File** button and select the relevant file from your local folder.



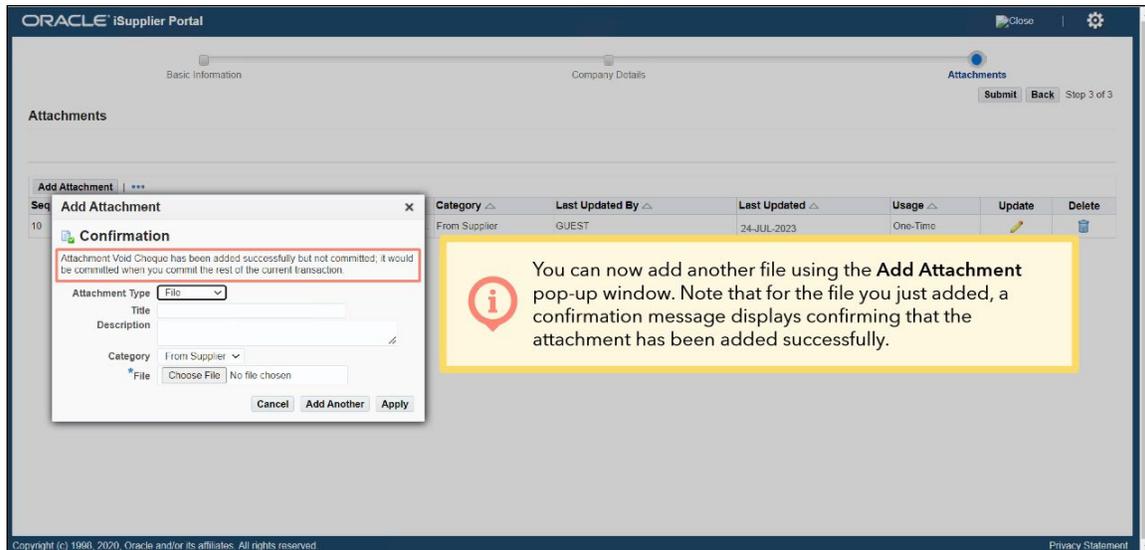
Once selected, the name of the uploaded file is displayed in the **File** field. The **Description** field is auto-populated based on the file selected. You can update the **Description** field, if required.



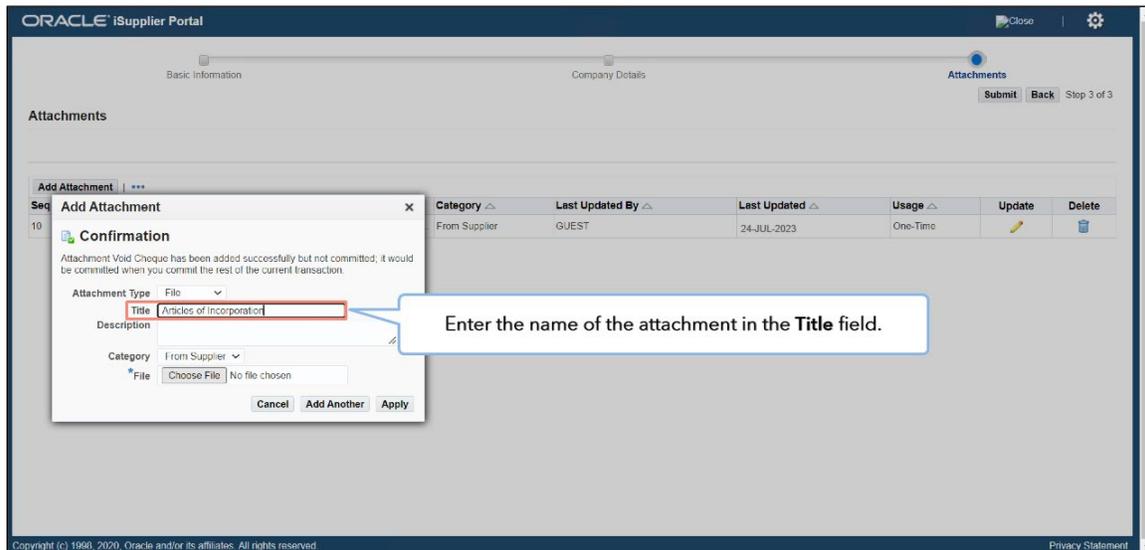
44. Click the **Add Another** button to select another file to attach.



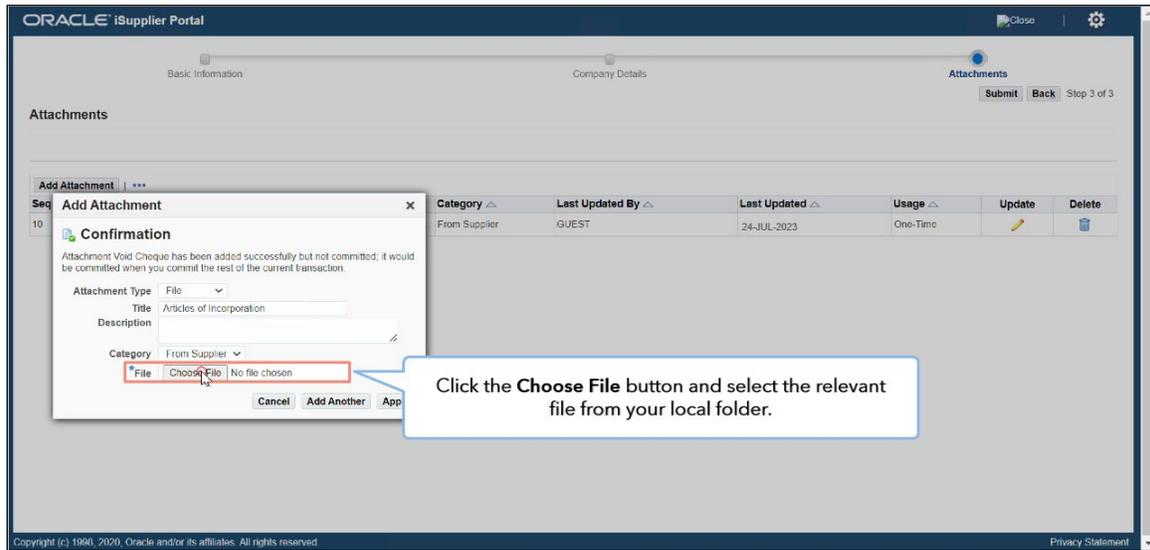
45. You can now add another file using the **Add Attachment** pop-up window. Note that for the file you just added, a confirmation message displays confirming that the attachment has been added successfully.



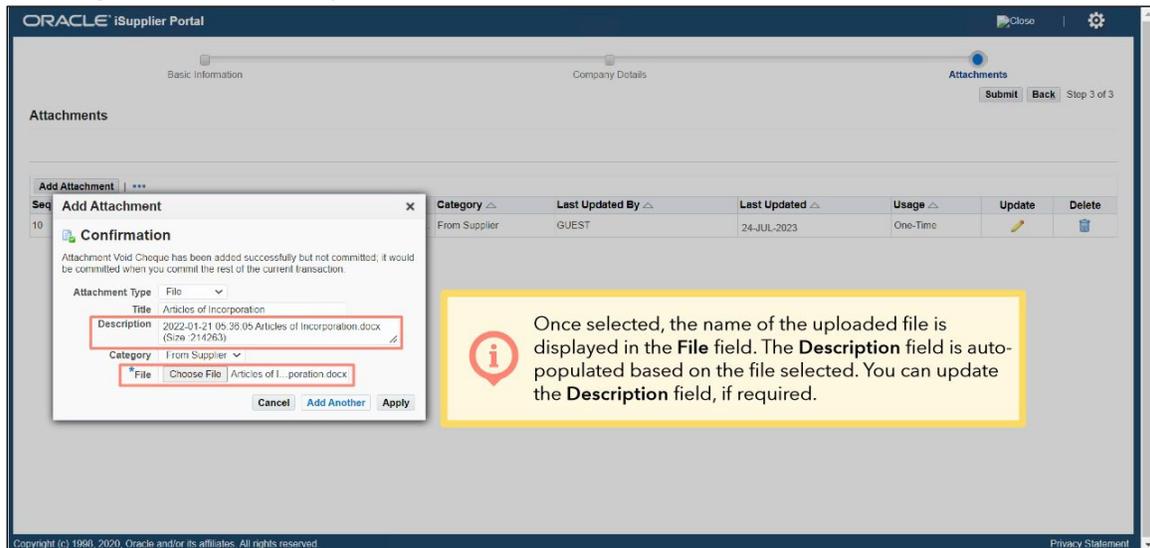
46. Enter the name of the attachment in the **Title** field.



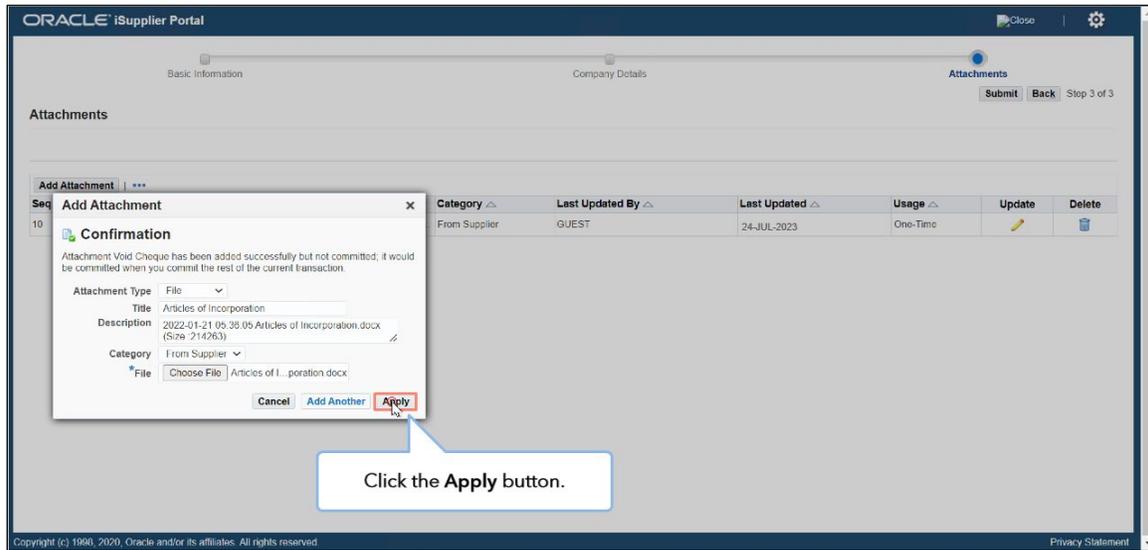
47. Click the **Choose File** button and select the relevant file from your local folder.



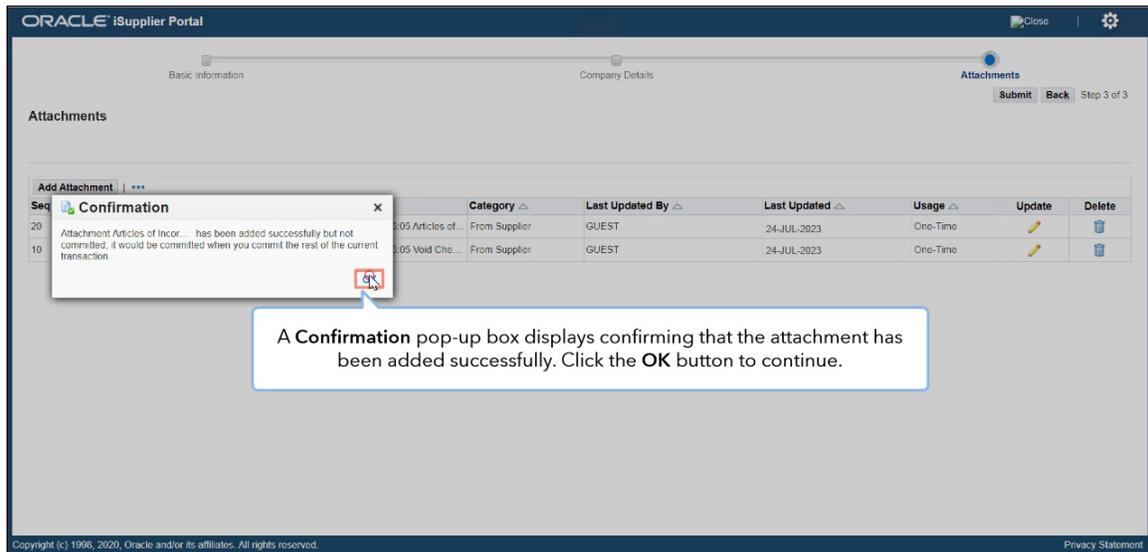
48. Once selected, the name of the uploaded file is displayed in the **File** field. The **Description** field is auto-populated based on the file selected. You can update the **Description** field, if required.



49. Click the **Apply** button.



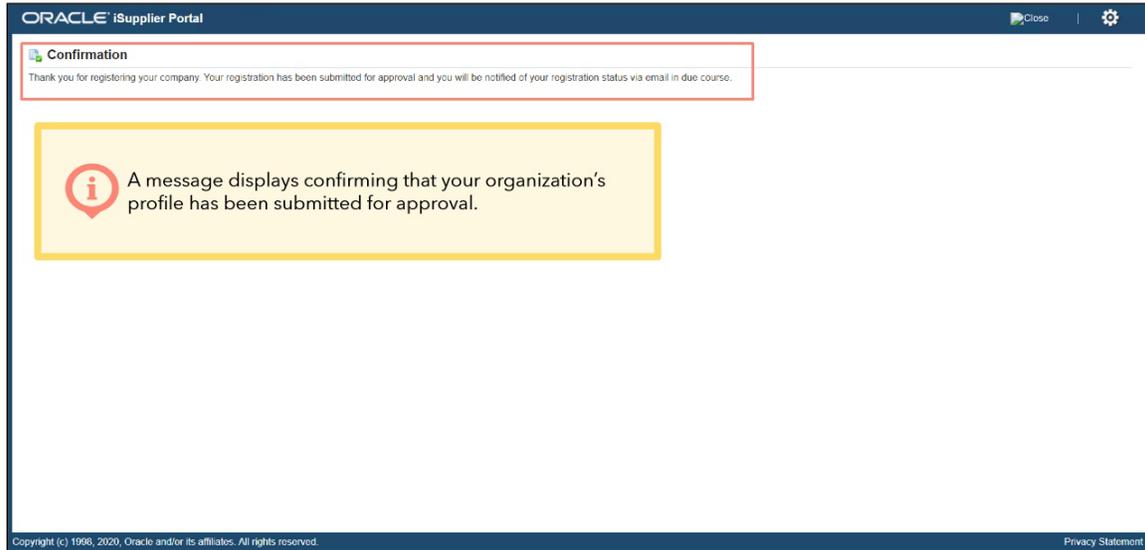
50. A **Confirmation** pop-up box displays confirming that the attachment has been added successfully. Click the **OK** button to continue.



The newly attached files are now displayed in the list of attachments.

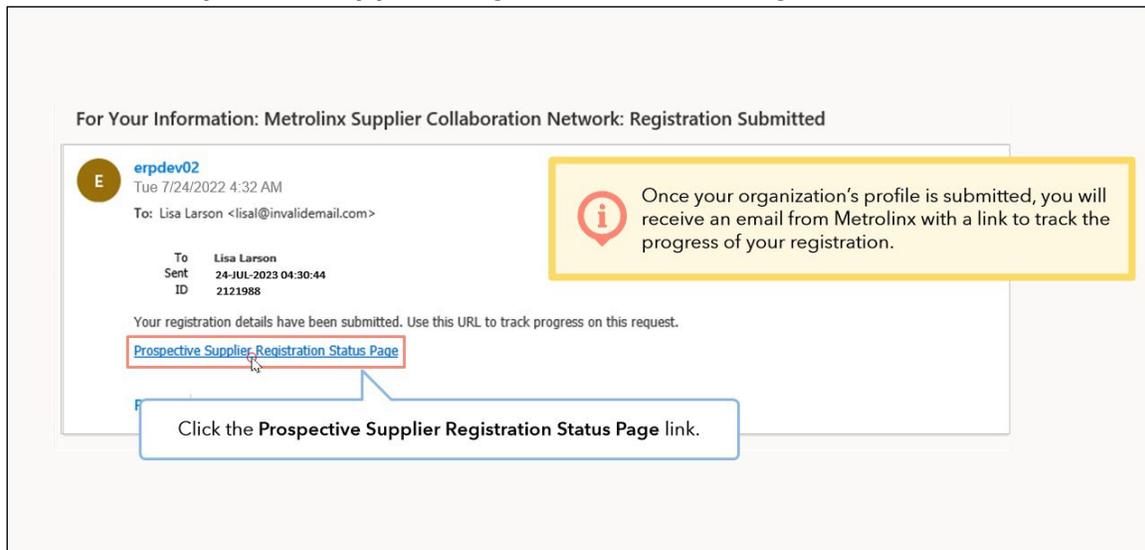
51. Click the **Submit** button.

A message displays confirming that your organization's profile has been submitted for approval.



Once your organization's profile is submitted, you will receive an email from Metrolinx with a link to track the progress of your registration.

52. Click the **Prospective Supplier Registration Status Page** link.



The **Prospective Supplier Registration: Current Status** page displays.

Note that the registration is currently in the **Pending Approval** status.

ORACLE iSupplier Portal

Prospective Supplier Registration: Current Status
Thank you for registering with us. Here's the current status of your registration request.

Registration Details and Status

Company Name: ACME Holdings Status: Pending Approval

Contact Information

Email: lisa@invalidemail.com
 First Name: Lisa
 Last Name: Larson
 Phone Area Code:
 Phone Number: 416.555.7890
 Phone Extension:

Status History

| Date | Status | Note |
|-------------|-----------------|---|
| 24-JUL-2023 | Submitted | The attachments and details for ACME Holdings are entered in the relevant sections. |
| 24-JUL-2023 | Invitation Sent | |

The **Prospective Supplier Registration: Current Status** page displays.
 Note that the registration is currently in the **Pending Approval** status.

Copyright (c) 1998, 2020, Oracle and/or its affiliates. All rights reserved. Privacy Statement

You will receive notifications via email once your profile and banking information have been approved in the system.

Once this occurs, you will be able to add additional users, manage your organization's profile, and submit invoices for payment.

ORACLE iSupplier Portal

Prospective Supplier Registration: Current Status
Thank you for registering with us. Here's the current status of your registration request.

Registration Details and Status

Company Name: ACME Holdings Status: Pending Approval

Contact Information

Email: lisa@invalidemail.com
 First Name: Lisa
 Last Name: Larson
 Phone Area Code:
 Phone Number: 416.555.7890
 Phone Extension:

Status History

| Date | Status | Note |
|-------------|-----------------|---|
| 24-JUL-2023 | Submitted | The attachments and details for ACME Holdings are entered in the relevant sections. |
| 24-JUL-2023 | Invitation Sent | |

You will receive notifications via email once your profile and banking information have been approved in the system.
 Once this occurs, you will be able to add additional users, manage your organization's profile, and submit invoices for payment.

Copyright (c) 1998, 2020, Oracle and/or its affiliates. All rights reserved. Privacy Statement