One-Time Vendor Registration

Version No: 1.0
Date: 11/09/2023

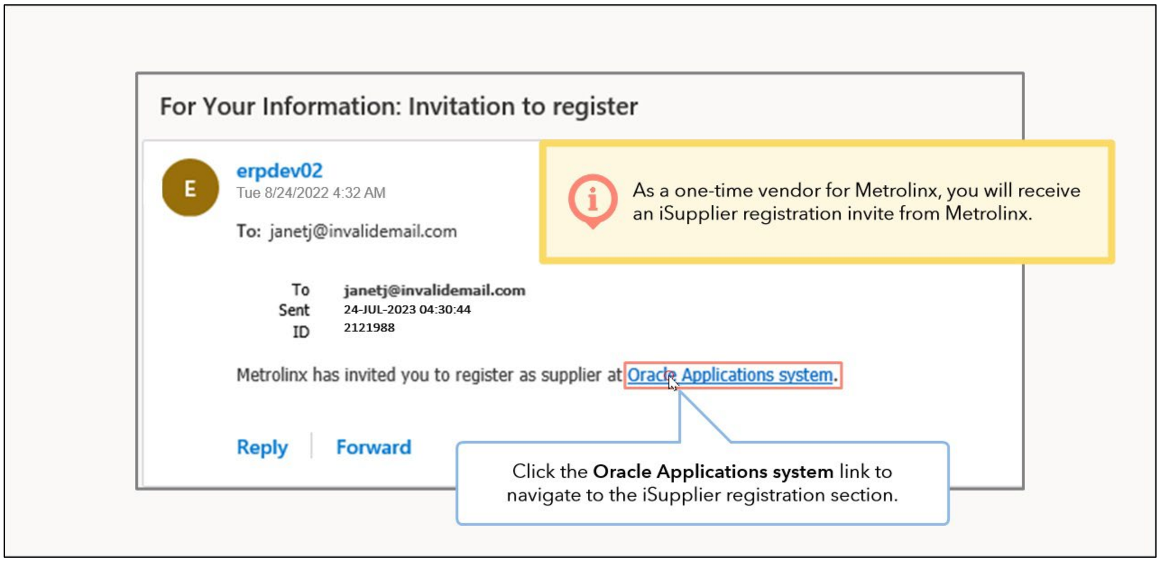
Overview
This document provides you the steps to register a one-time vendor.

One-Time Vendor Registration

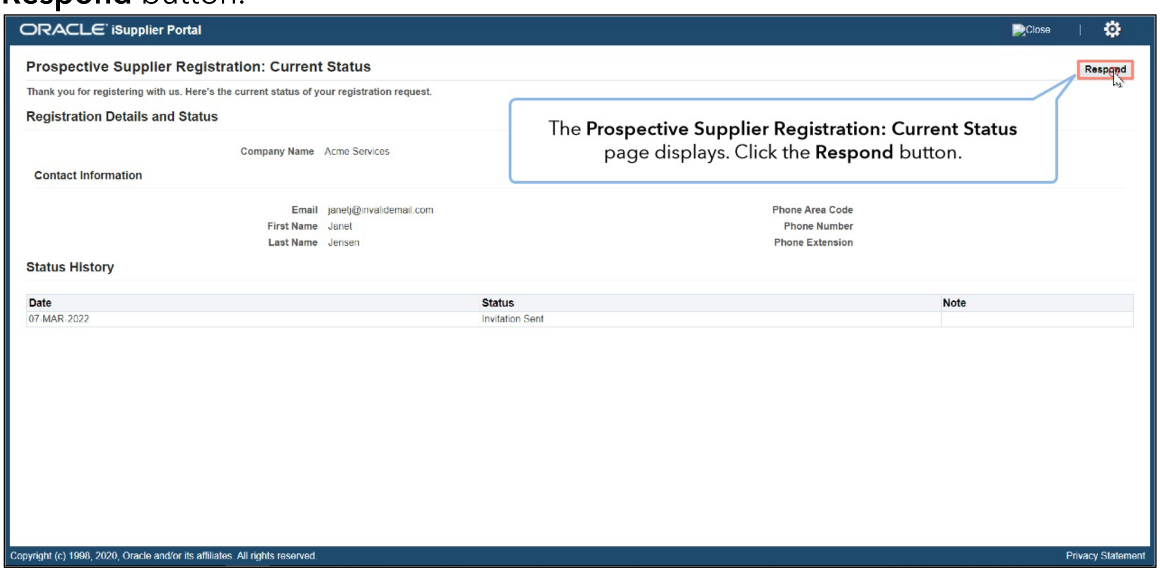
As a one-time vendor for Metrolinx, you will receive an iSupplier registration invite from Metrolinx.

Follow the steps below to register a new vendor:

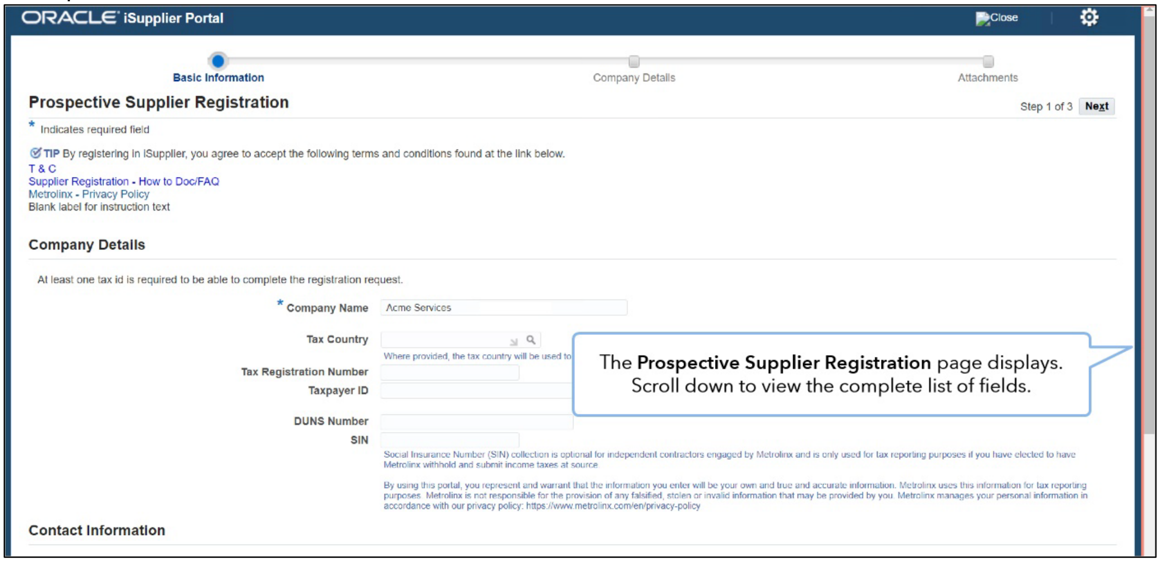
1. Click the **Oracle Applications system** link to navigate to the iSupplier registration section.



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

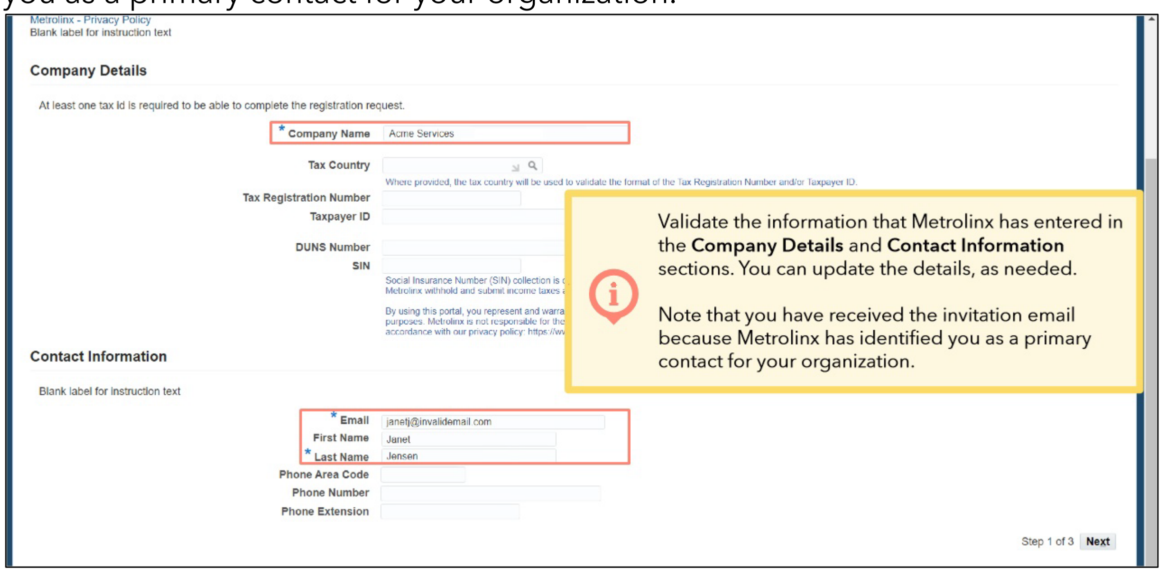


3. The **Prospective Supplier Registration** page displays. Scroll down to view the complete list of fields.



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

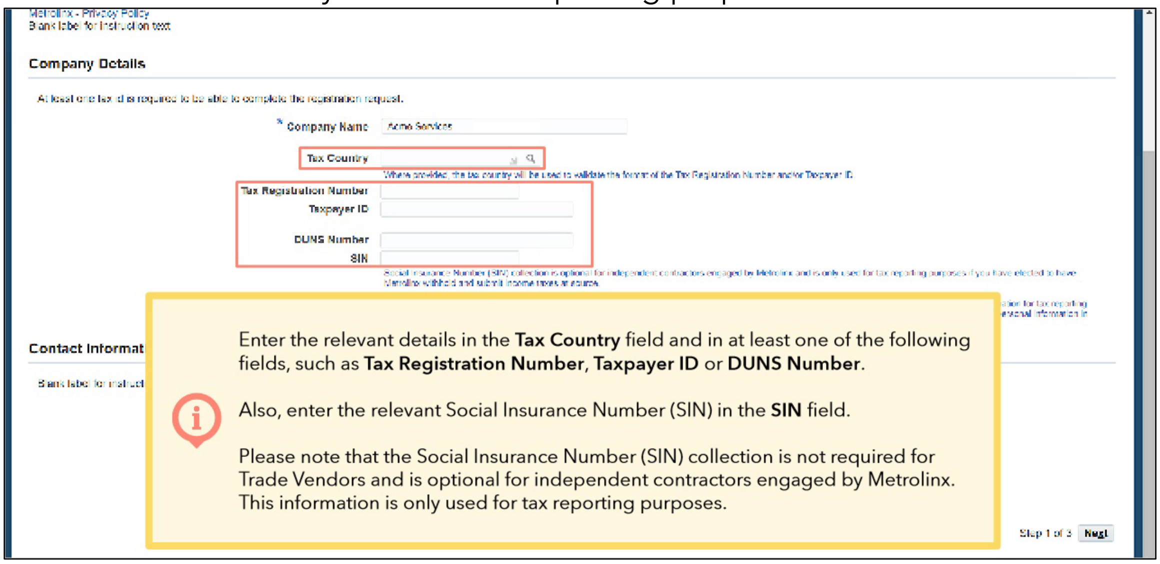
Note that you have received the invitation email because Metrolinx has identified you as a primary contact for your organization.



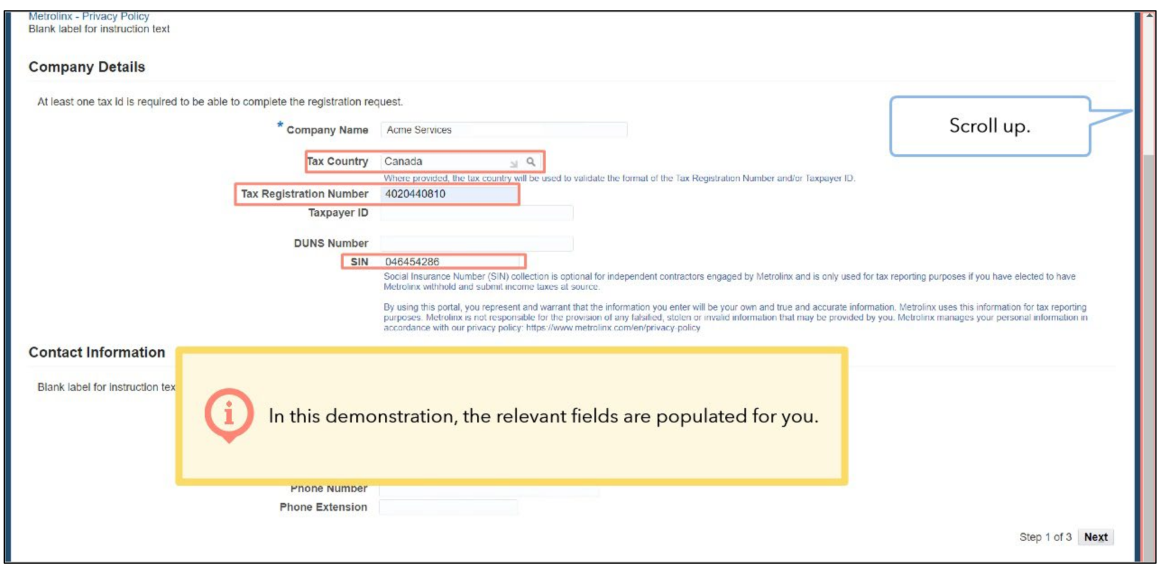
Enter the relevant details in the **Tax Country** field and in at least one of the following fields, such as **Tax Registration Number**, **Taxpayer ID** or **DUNS** Number.

Also, enter the relevant Social Insurance Number (SIN) in the **SIN** field.

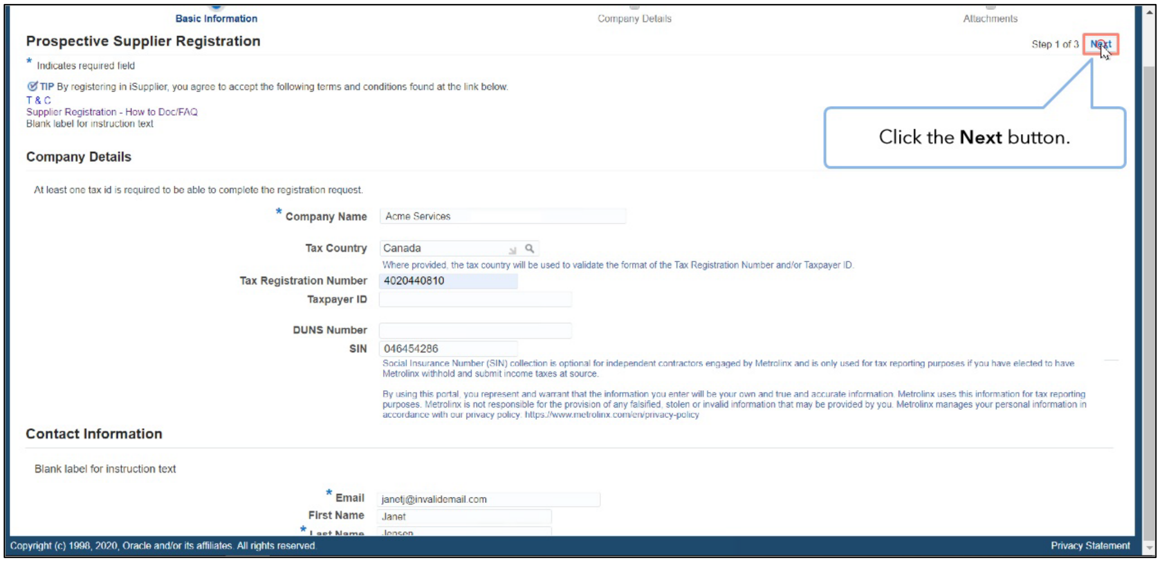
Please note that the Social Insurance Number (SIN) collection is not required for Trade Vendors and is optional for independent contractors engaged by Metrolinx. This information is only used for tax reporting purposes.



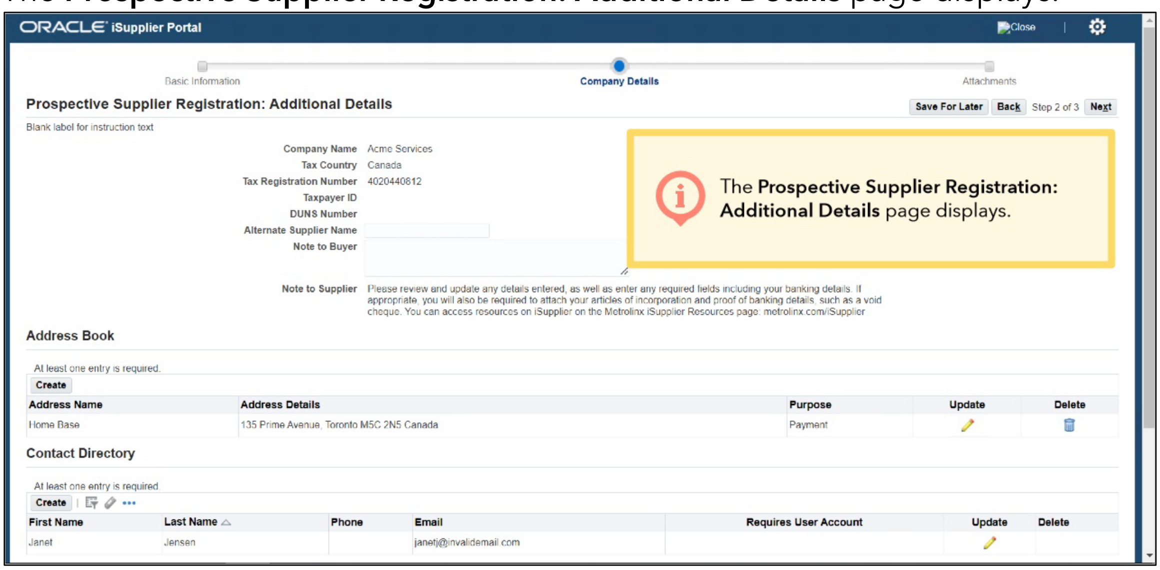
In this demonstration, the relevant fields are populated for you.



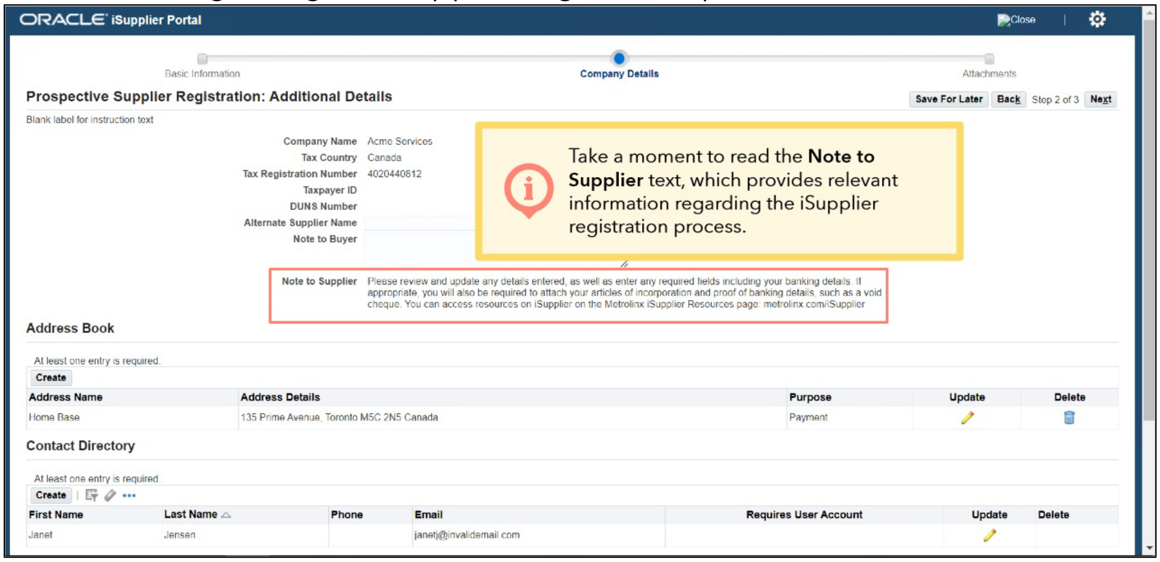
4. Click the **Next** button.



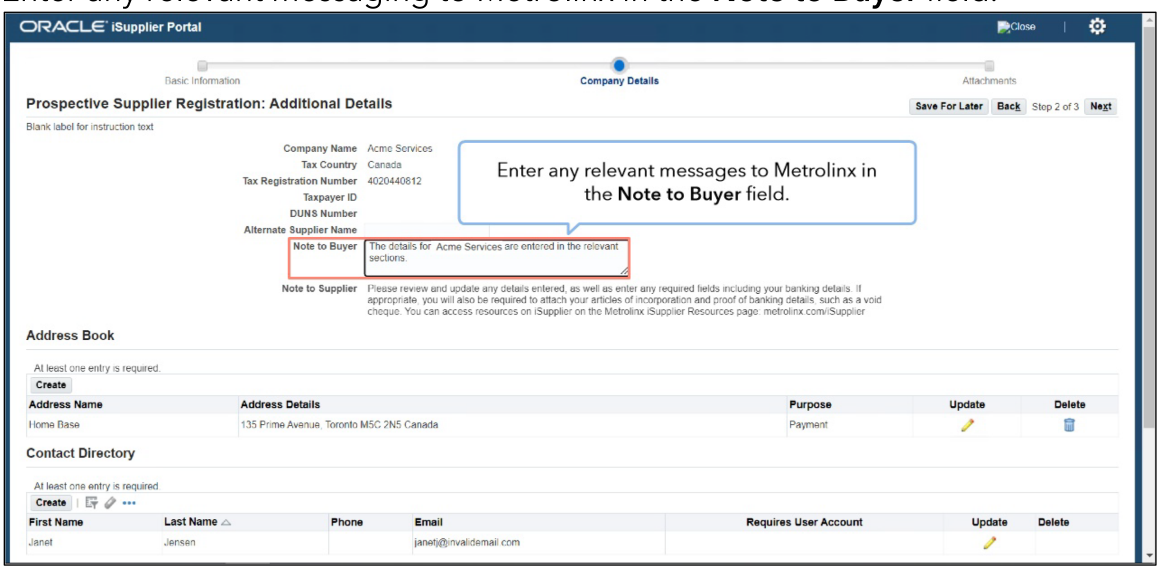
The **Prospective Supplier Registration: Additional Details** page displays.



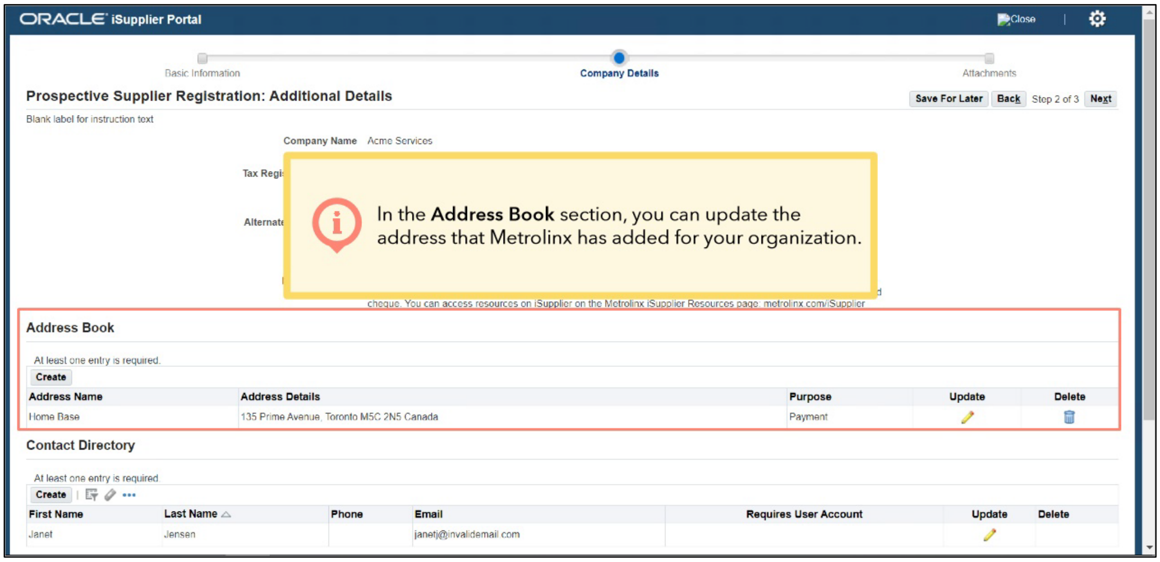
Take a moment to read the **Note to Supplier** text which provides relevant information regarding the iSupplier registration process.



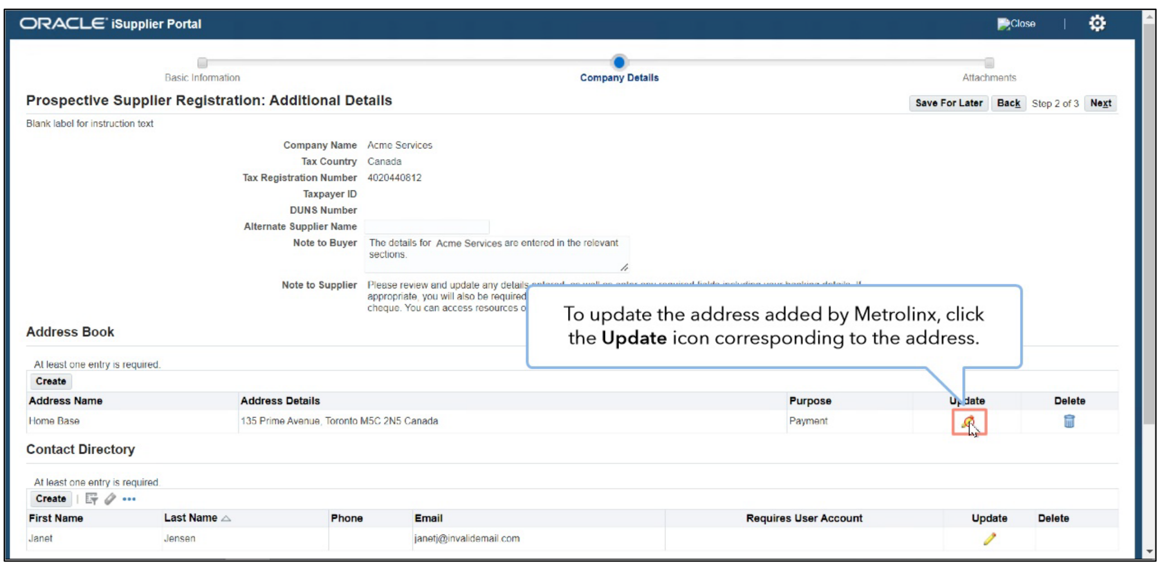
5. Enter any relevant messaging to Metrolinx in the **Note to Buyer** field.



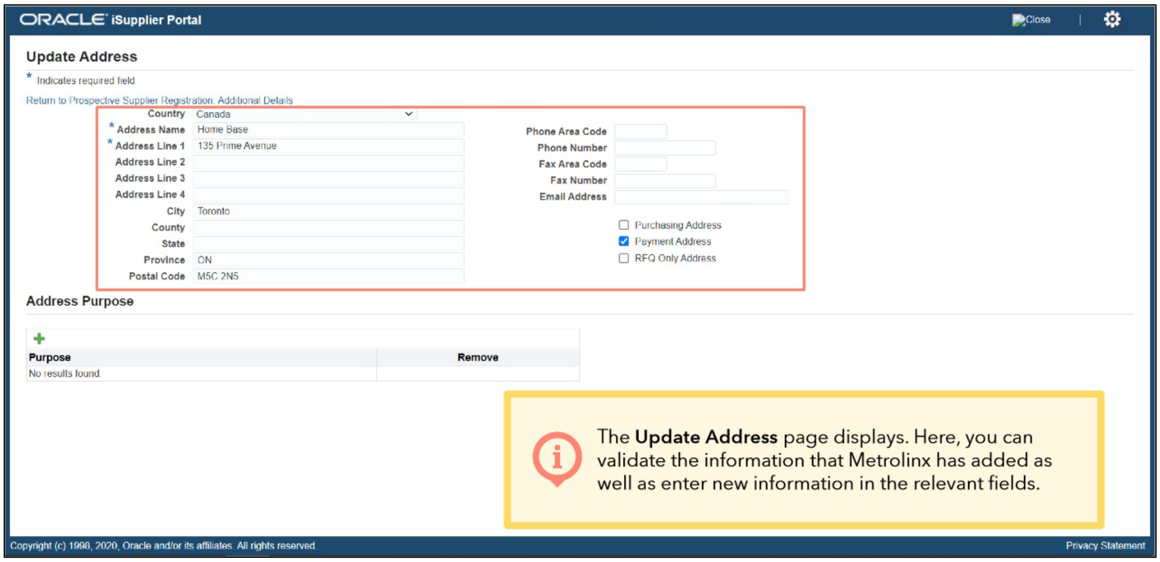
In the **Address Book** section, you can add a new address as well as update the address that Metrolinx has added for your organization.



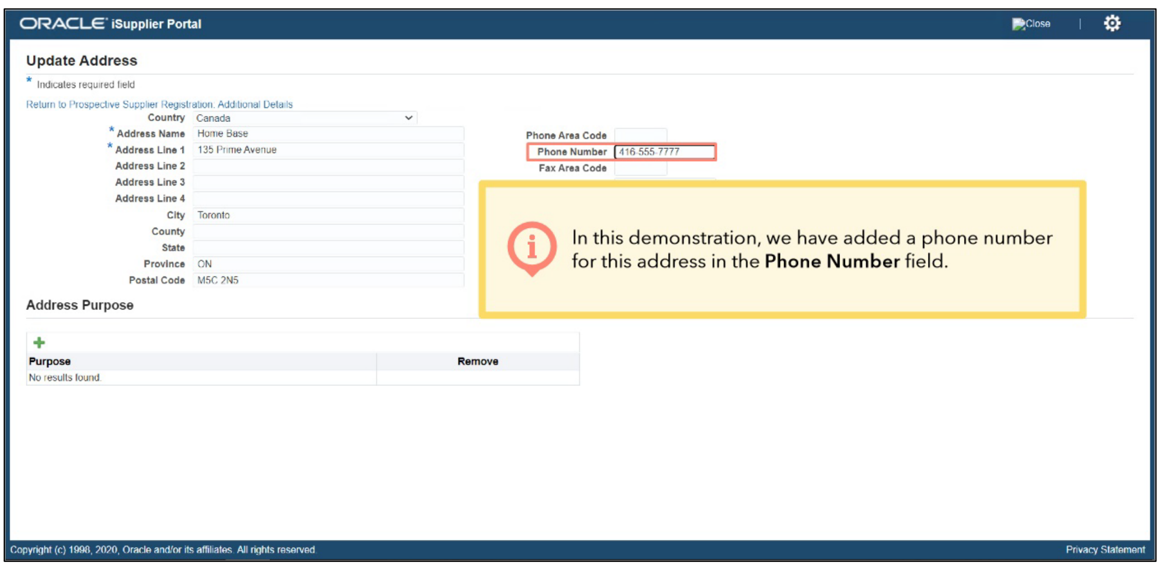
6. To update the address added by Metrolinx, click the **Update** icon corresponding to the address.



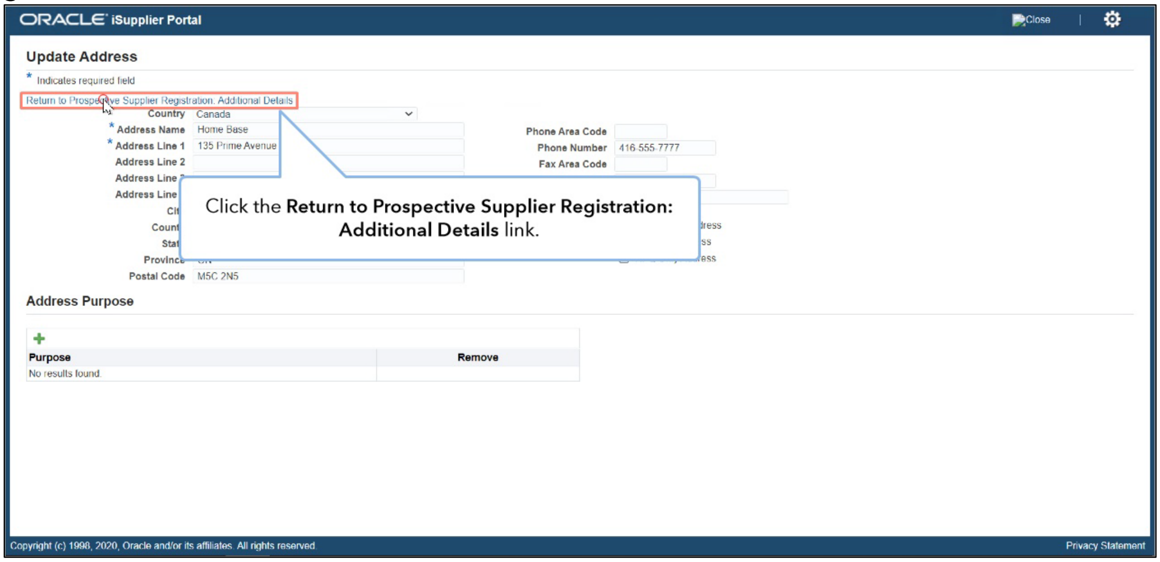
The **Update Address** page displays. Here, you can validate the information that Metrolinx has added as well as enter new information in the relevant fields.



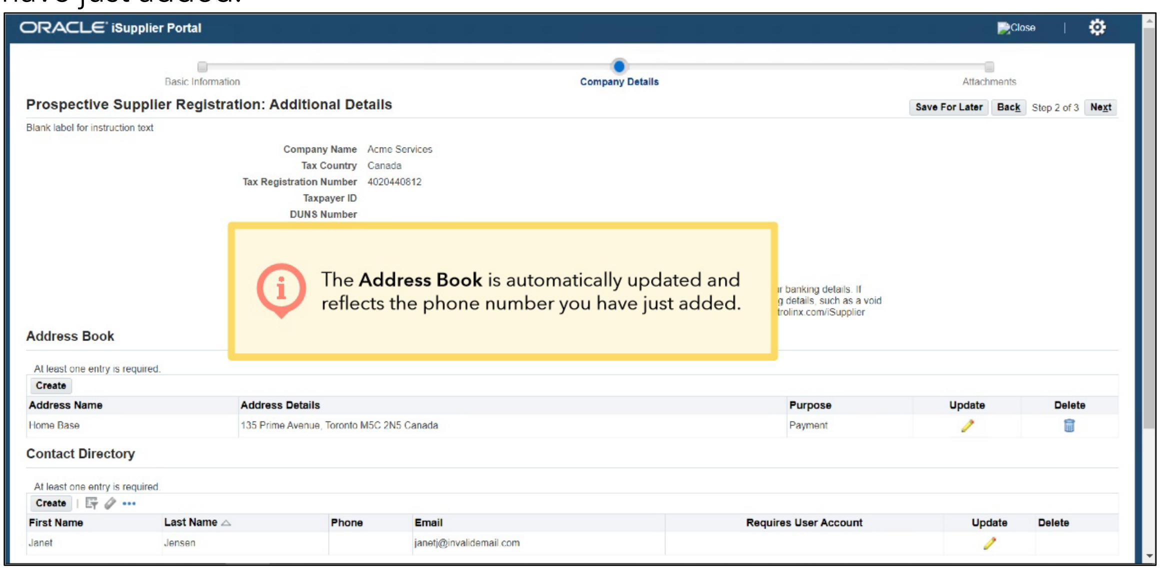
In this demonstration, we have added a phone number for this address in the **Phone Number** field.



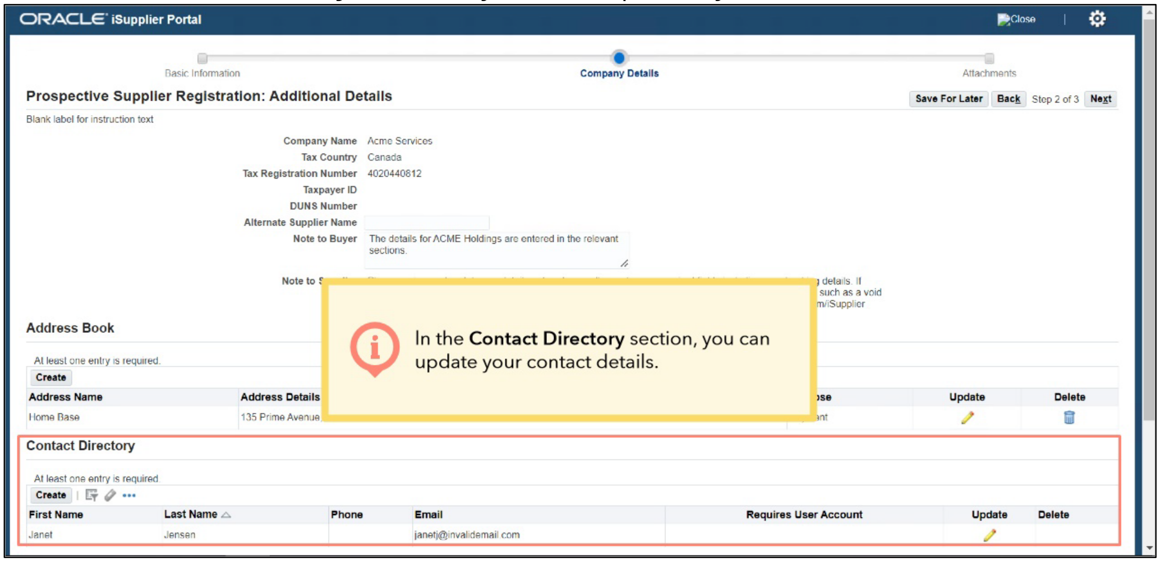
7. Click the **Return to Prospective Supplier Registration: Additional Details** button to go back.



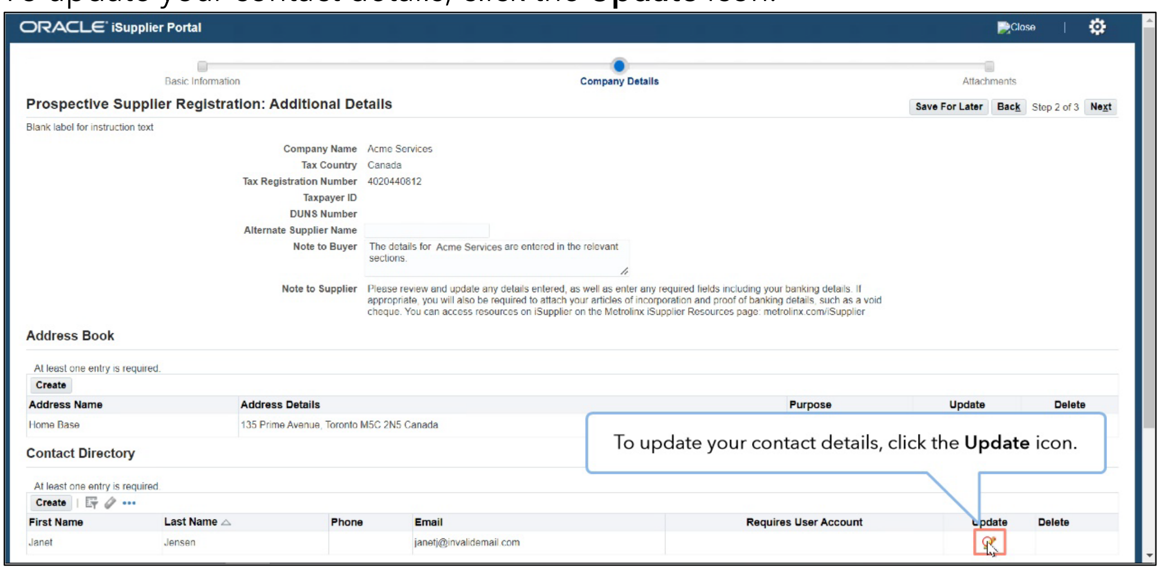
The **Address Book** is automatically updated and reflects the phone number you have just added.



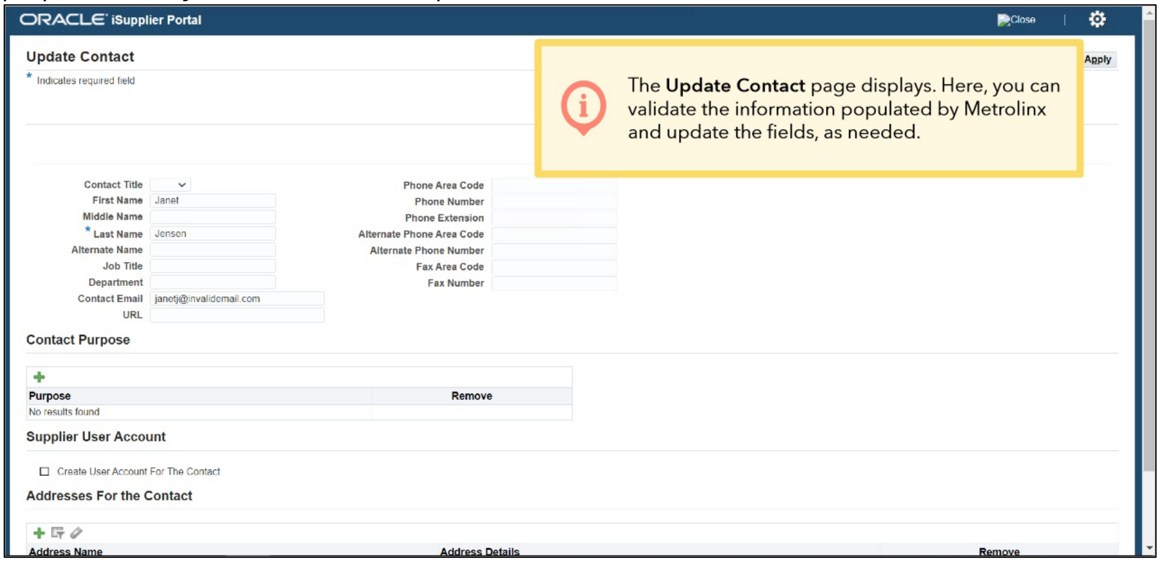
In the **Contact Directory** section, you can update your contact details.



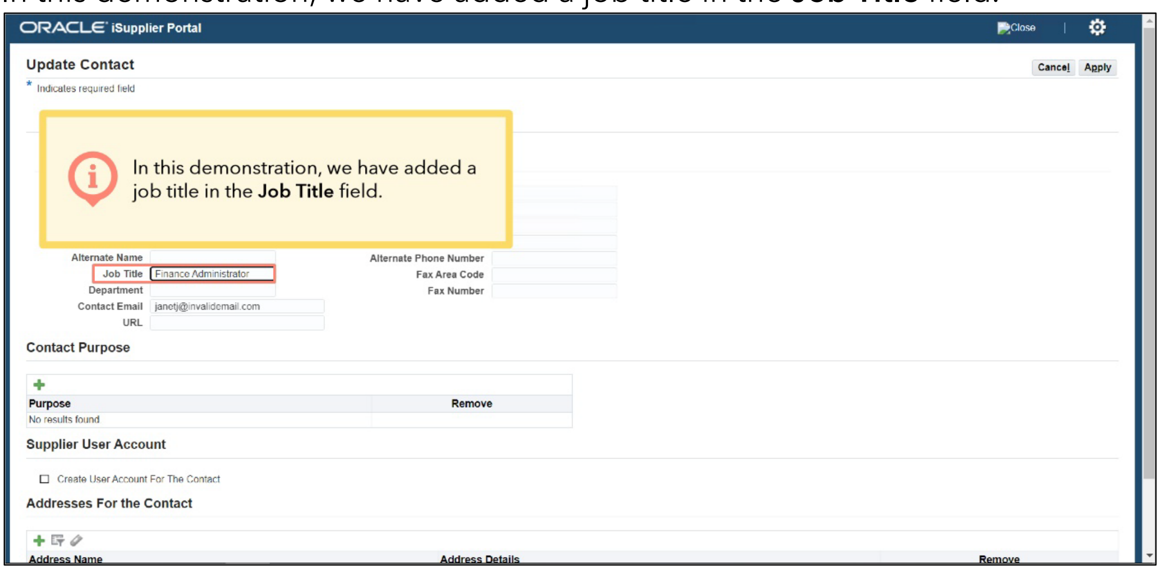
8. To update your contact details, click the **Update** icon.



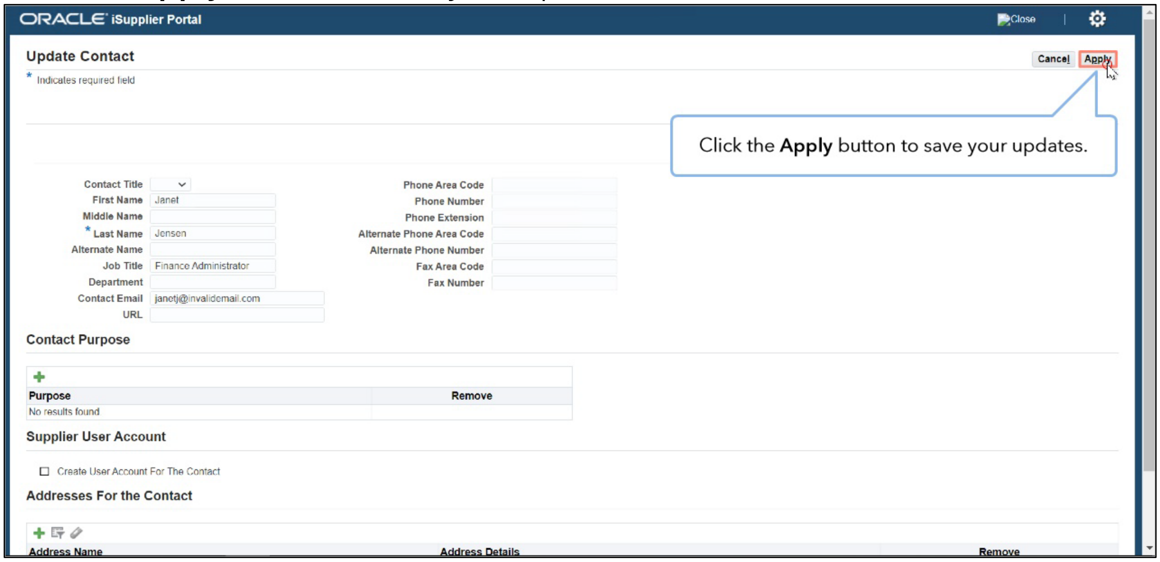
The **Update Contact** page displays. Here, you can validate the information populated by Metrolinx and update the fields, as needed.



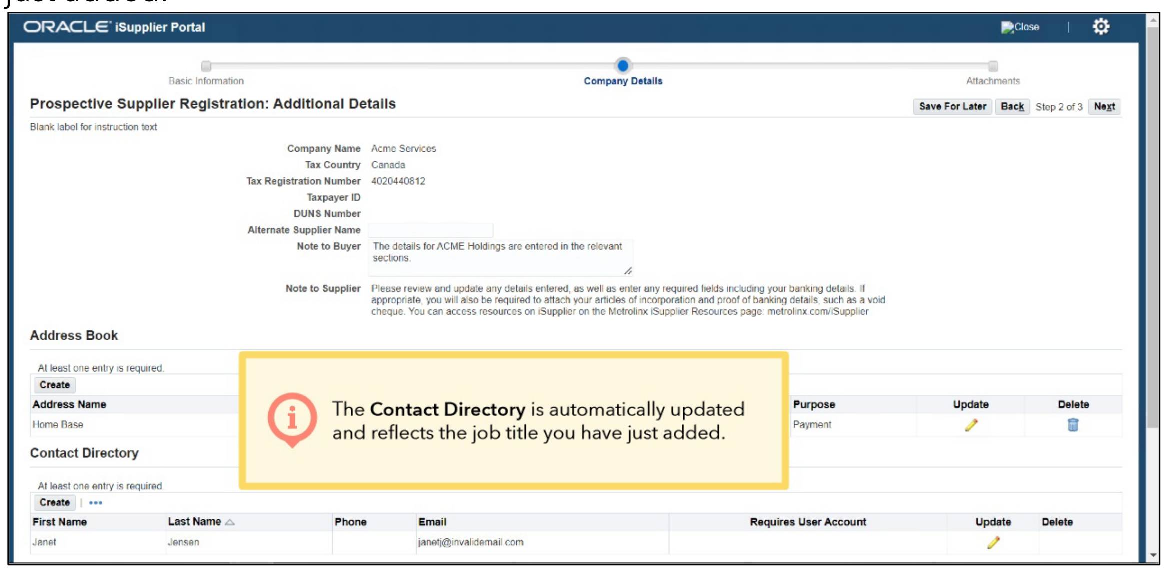
In this demonstration, we have added a job title in the **Job Title** field.



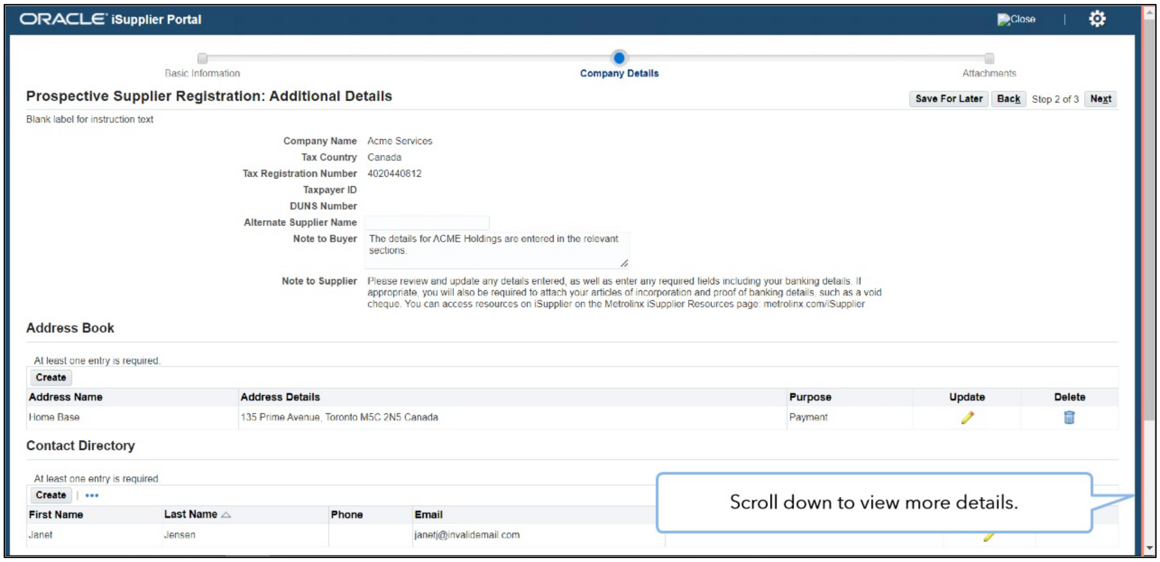
9. Click the **Apply** button to save your updates.



The **Contact Directory** is automatically updated and reflects the job title you have just added.

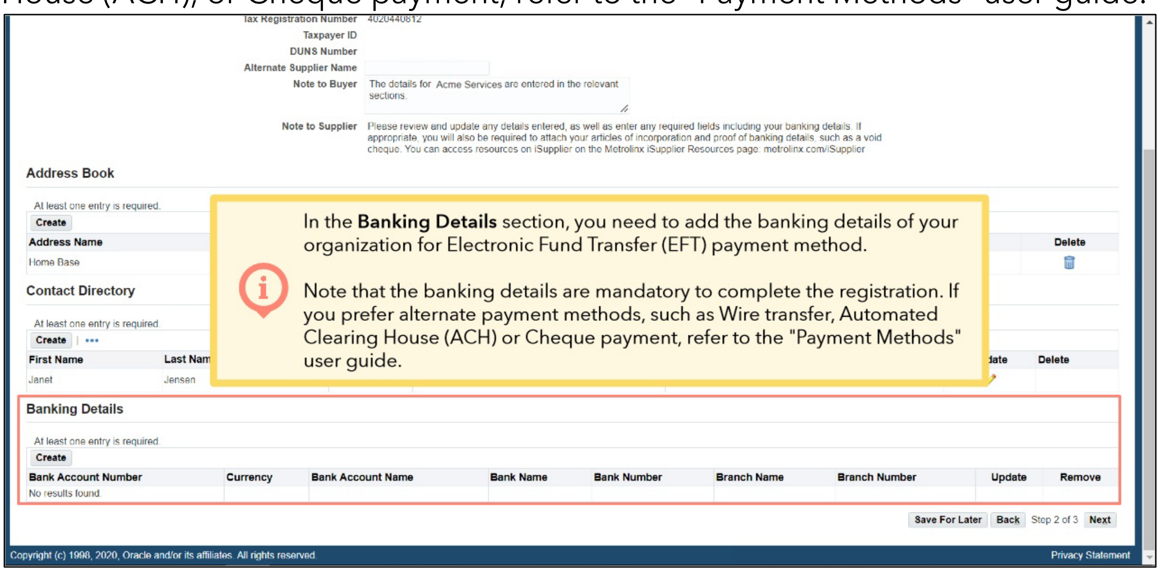


10. Scroll down to view more details.

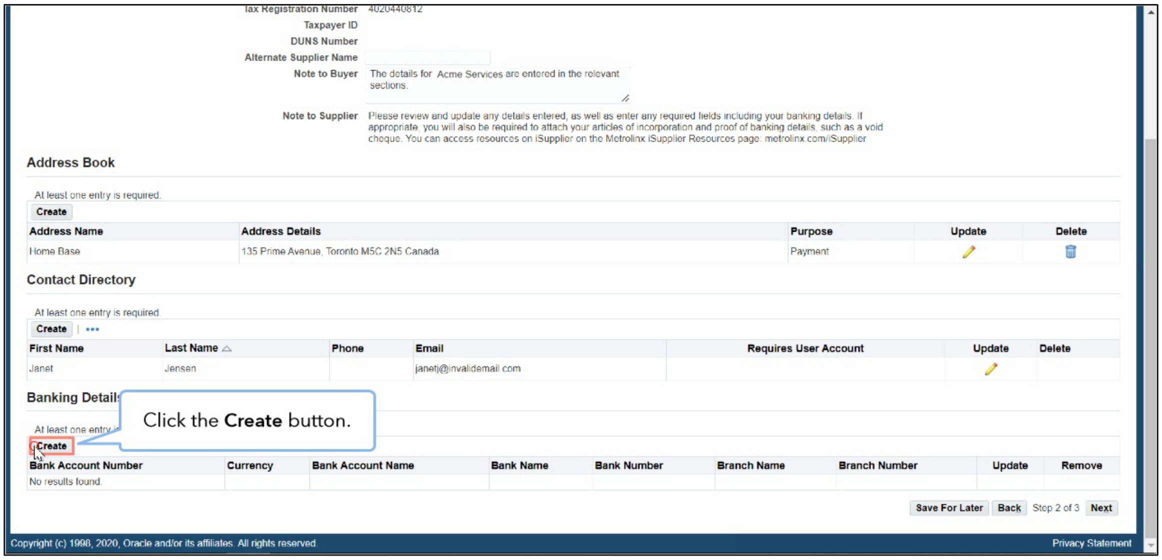


In the **Banking Details** section, you need to add the banking details of your organization for the EFT mode of payment.

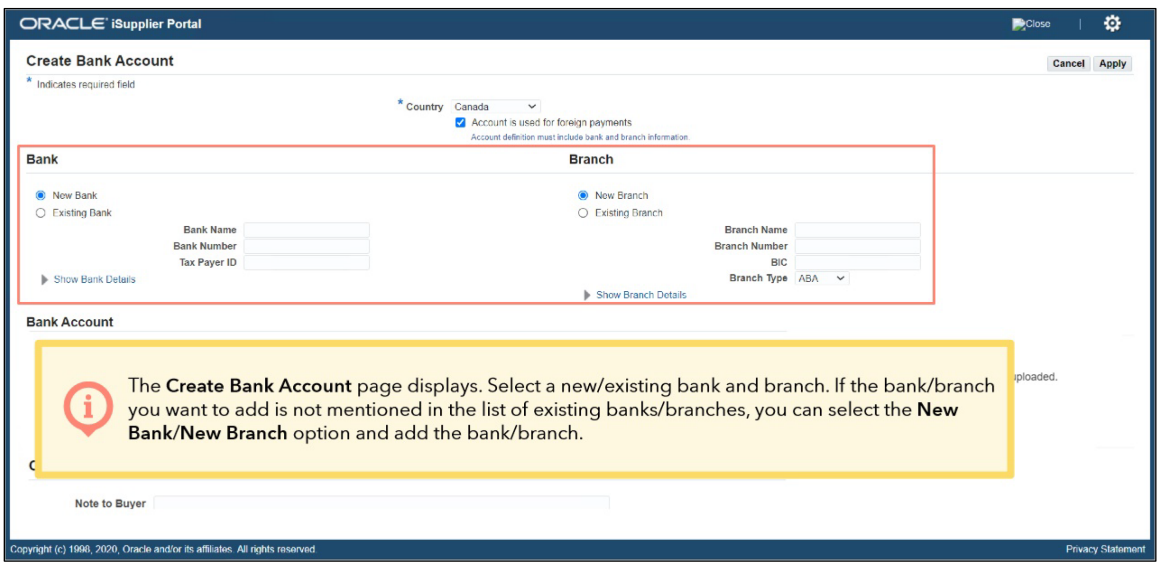
Note: The banking details are mandatory to complete the registration. If you prefer alternate modes of payment such as Wire transfer, Automated Clearing House (ACH), or Cheque payment, refer to the "Payment Methods" user guide.



11. Click the **Create** button.

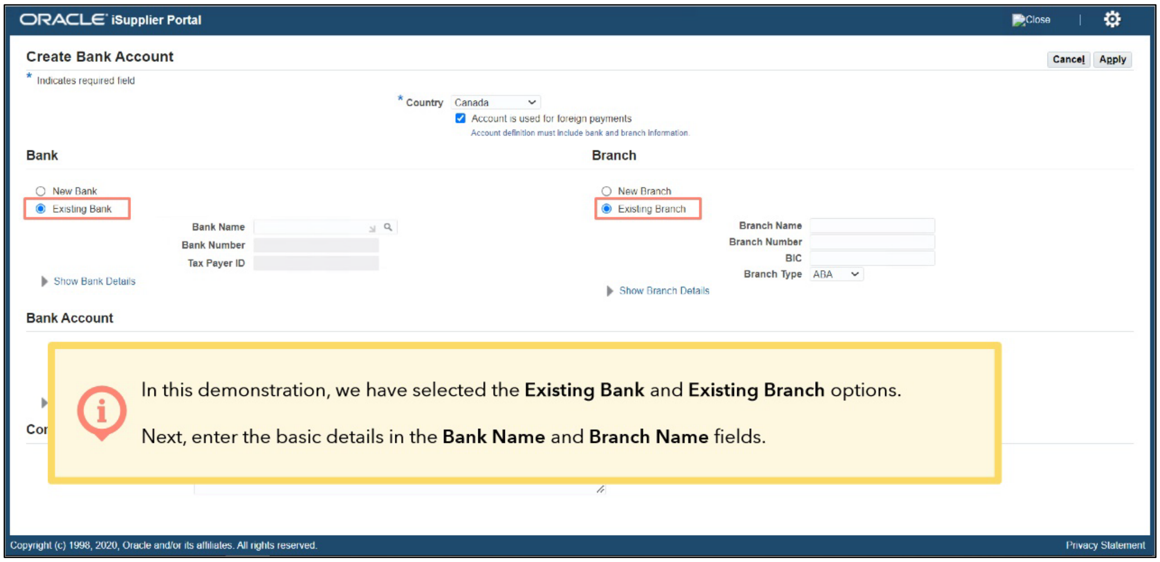


The **Create Bank Account** page displays. Select a new/existing bank and branch. If the bank/branch you want to add is not mentioned in the list of existing banks/branches, you can select the **New Bank**/**New Branch** option and add the bank/branch.



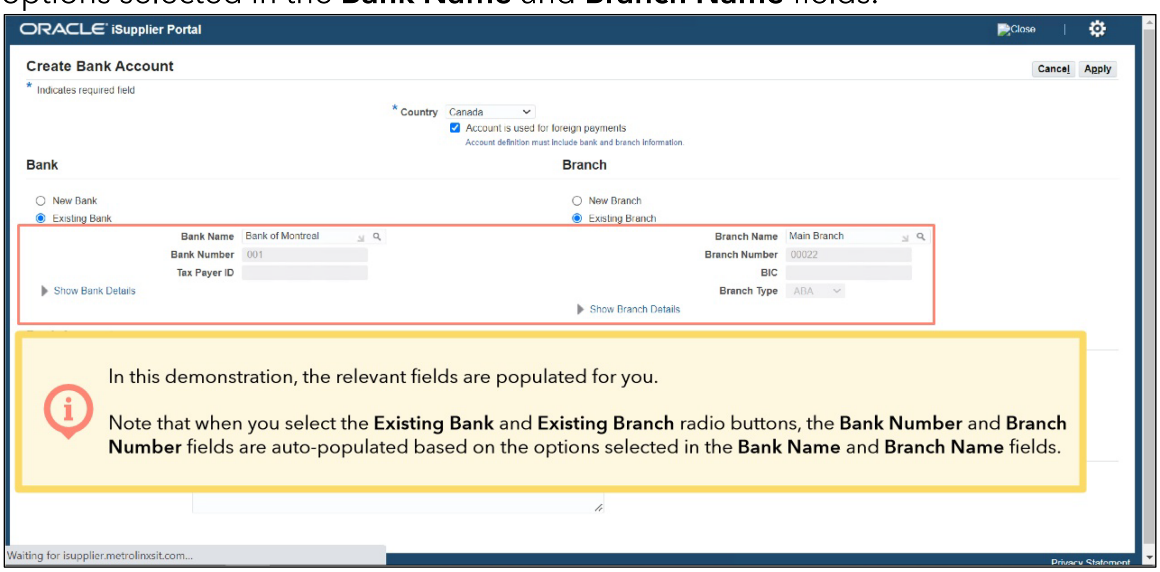
In this demonstration, we have selected the **Existing Bank** and **Existing Branch** options.

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

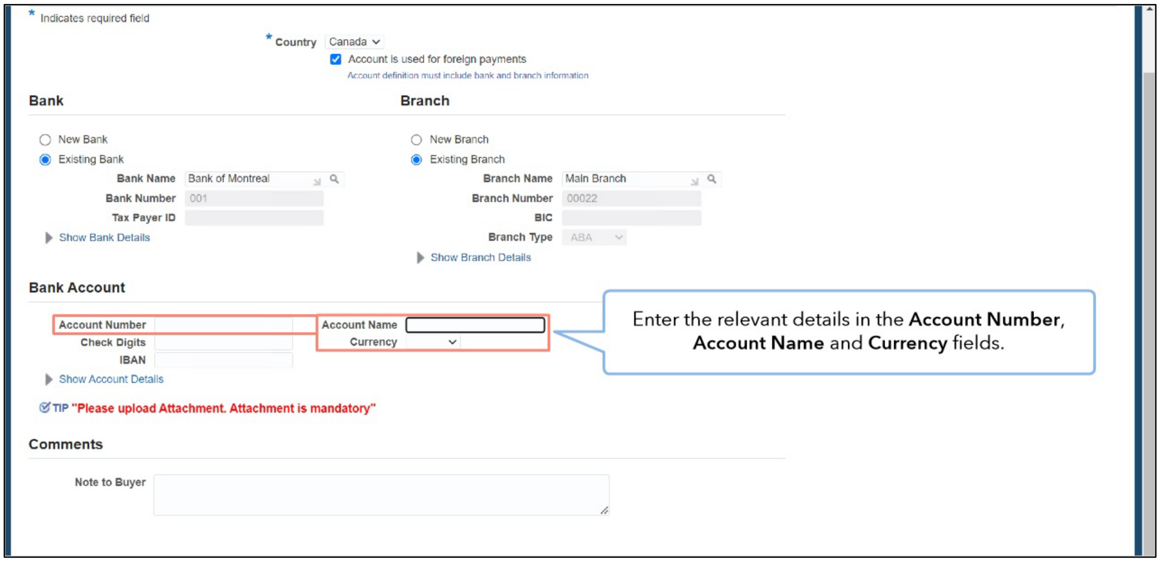


In this demonstration, the relevant fields are populated for you.

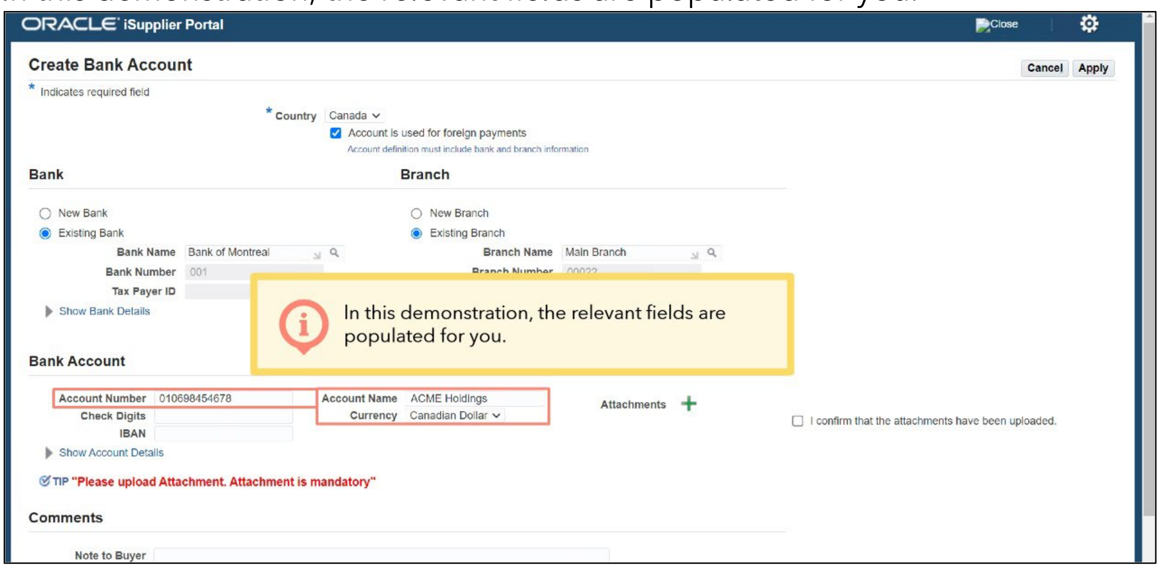
Note: When you select the **Existing Bank** and **Existing Branch** radio buttons, the **Bank Number** and **Branch Number** fields are auto populated based on the options selected in the **Bank Name** and **Branch Name** fields.



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



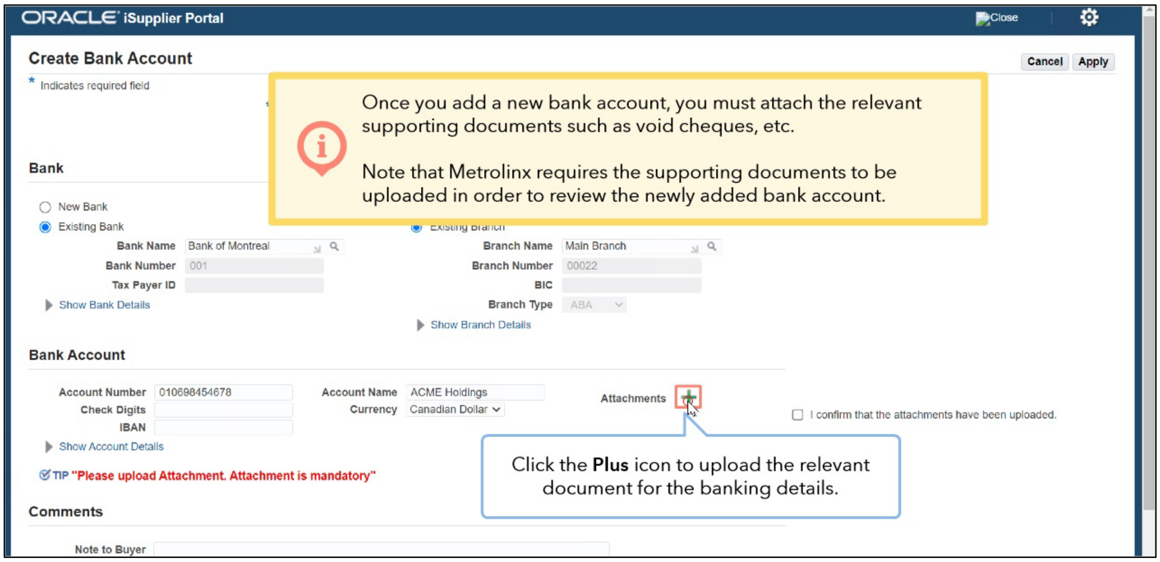
In this demonstration, the relevant fields are populated for you.



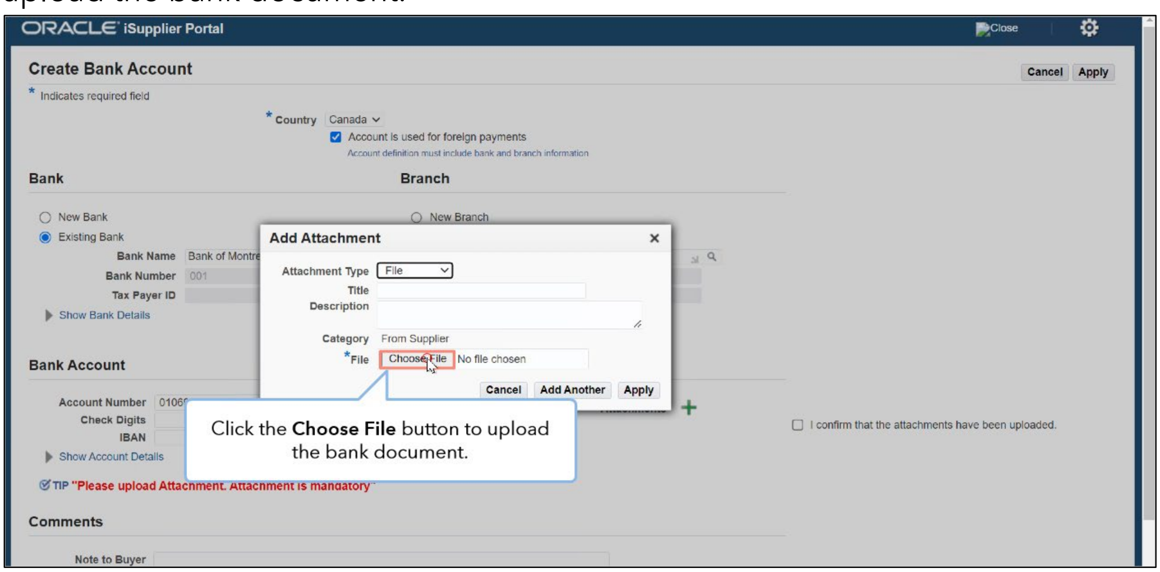
Once you add a new bank account, you must attach the relevant supporting documents such as void cheques, etc.

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

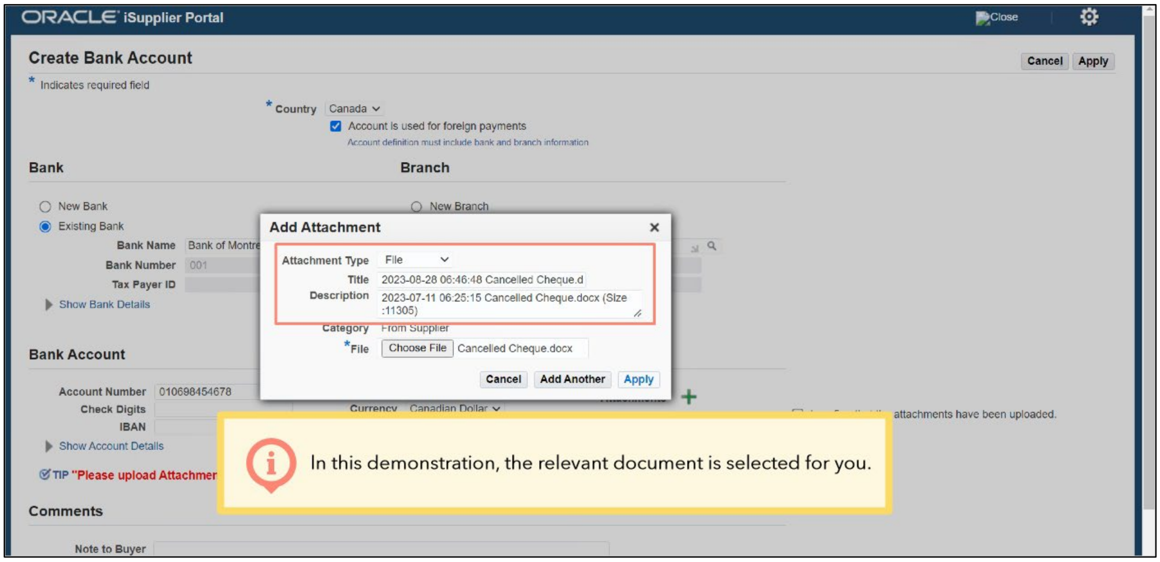
12. Click the **Plus** icon to upload the relevant document for the banking details.



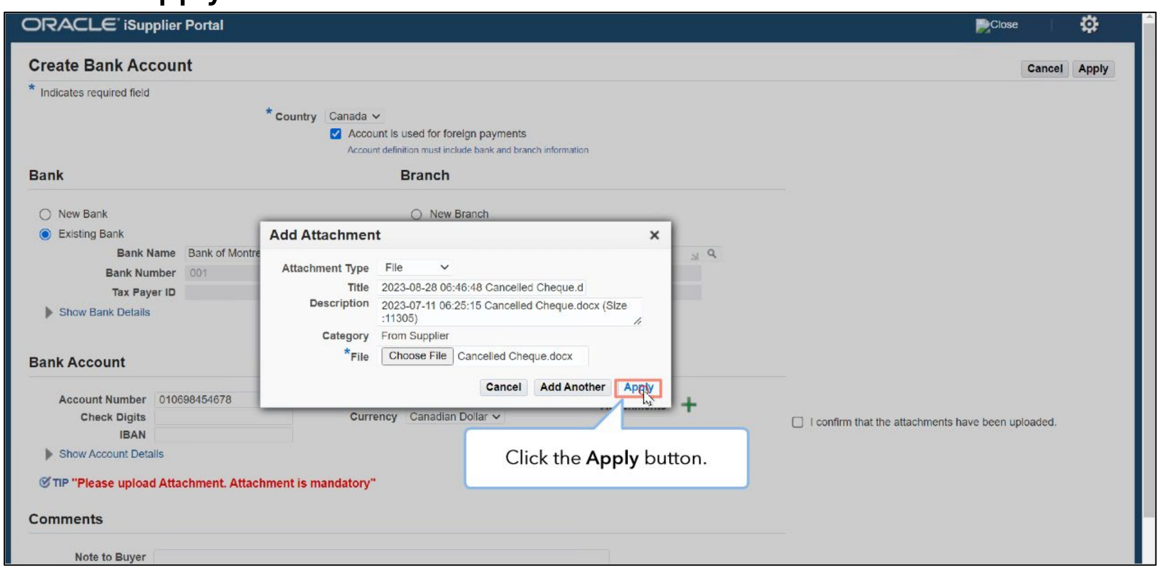
13. The Add Attachment pop-up window displays. Click the **Choose File** button to upload the bank document.



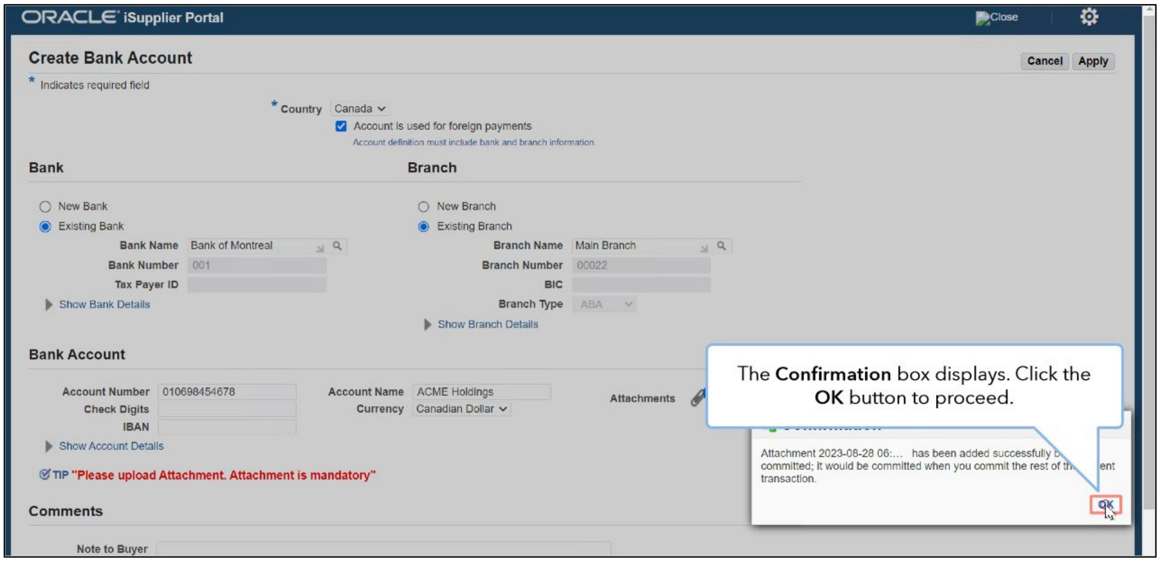
In this demonstration, the relevant document is selected for you.



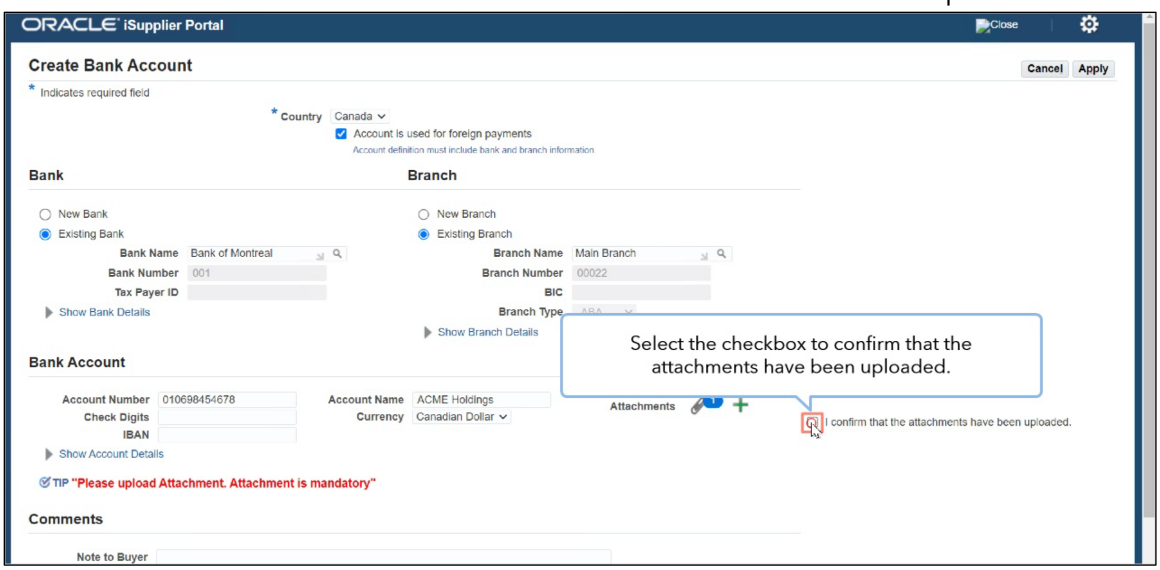
14. Click the **Apply** button.



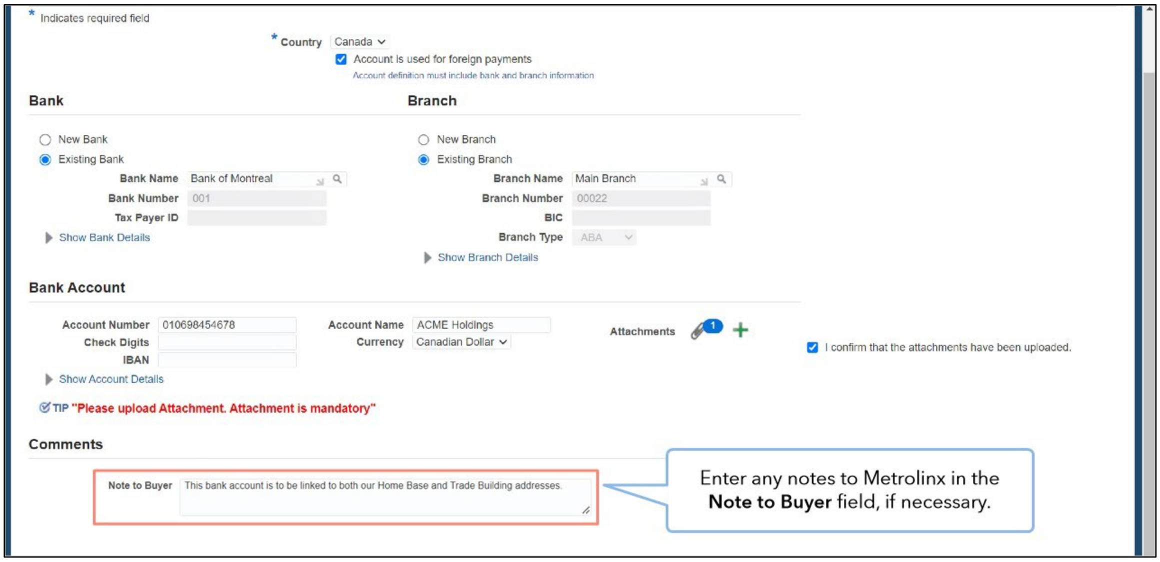
15. The **Confirmation** box displays. Click the **OK** button to proceed.



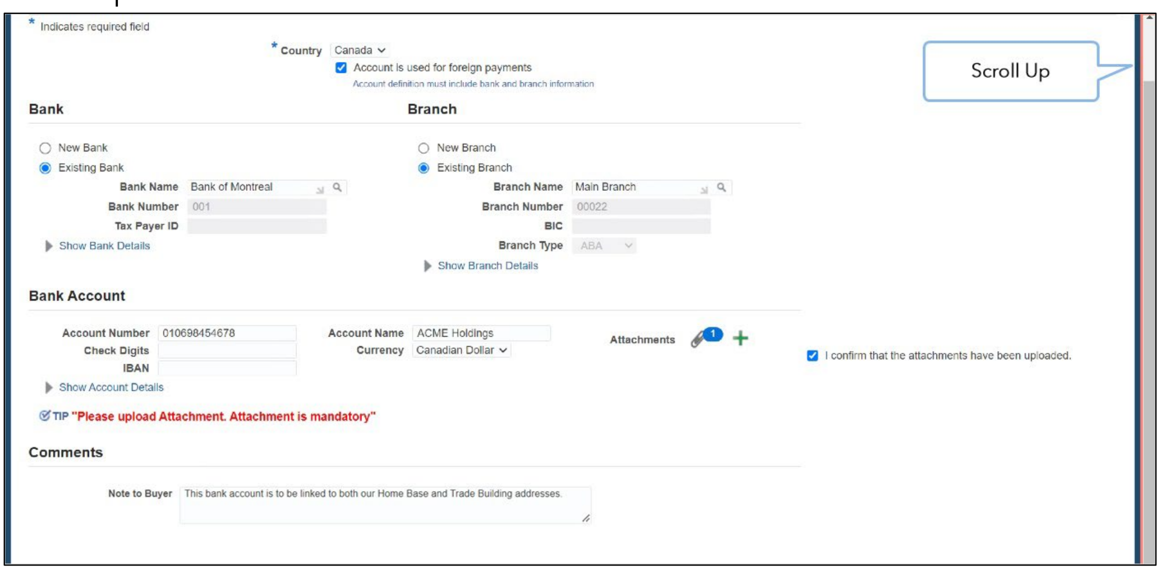
16. Select the checkbox to confirm that the attachments have been uploaded.



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



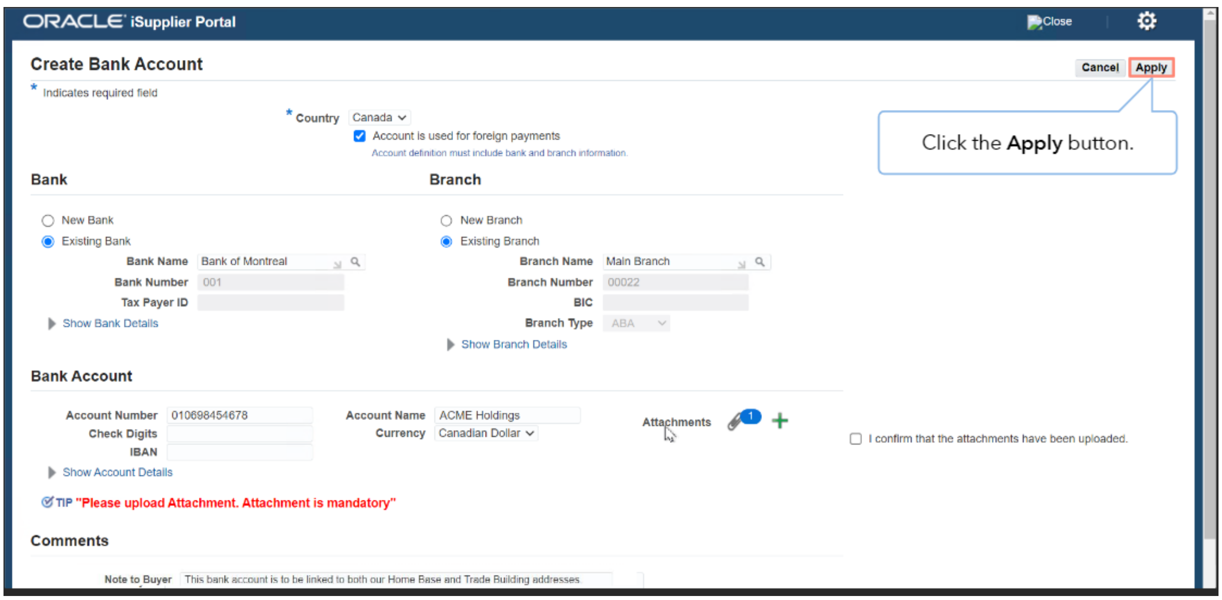
18. Scroll Up.



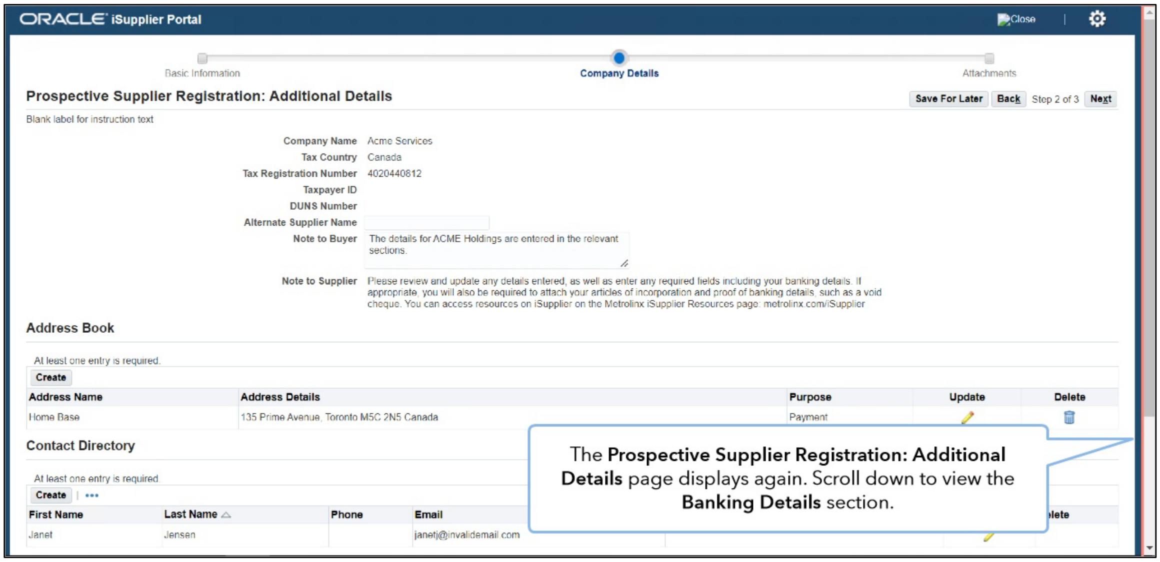
As part of the process of adding a new bank account, please ensure that you enter a note to the buyer specifying to which address(es) the banking information should be applied.

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 you about the approval of bank details.

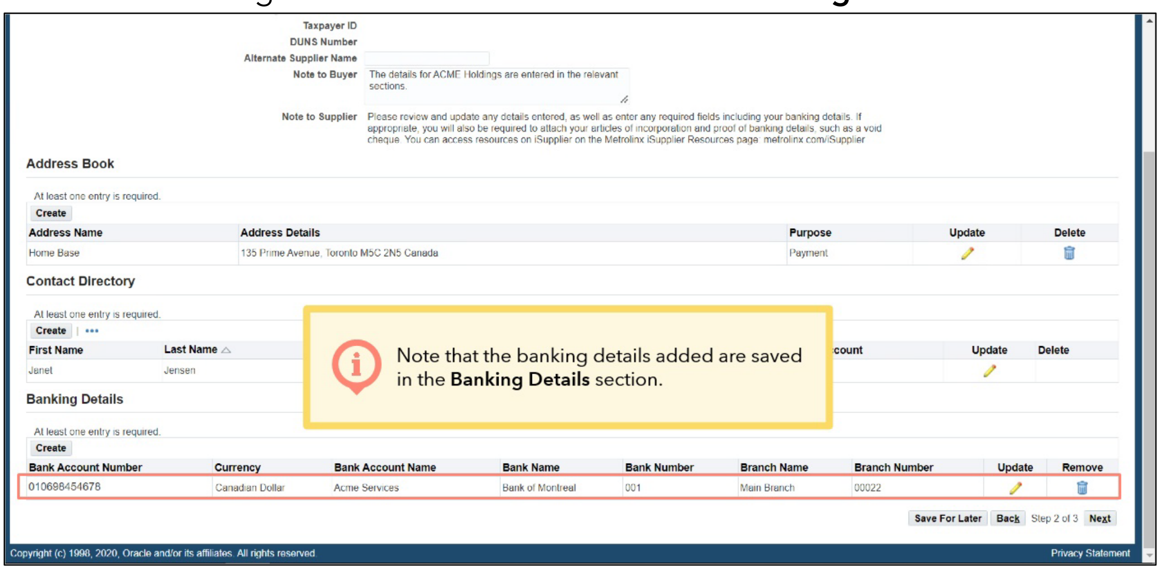
19. Click the **Apply** button.



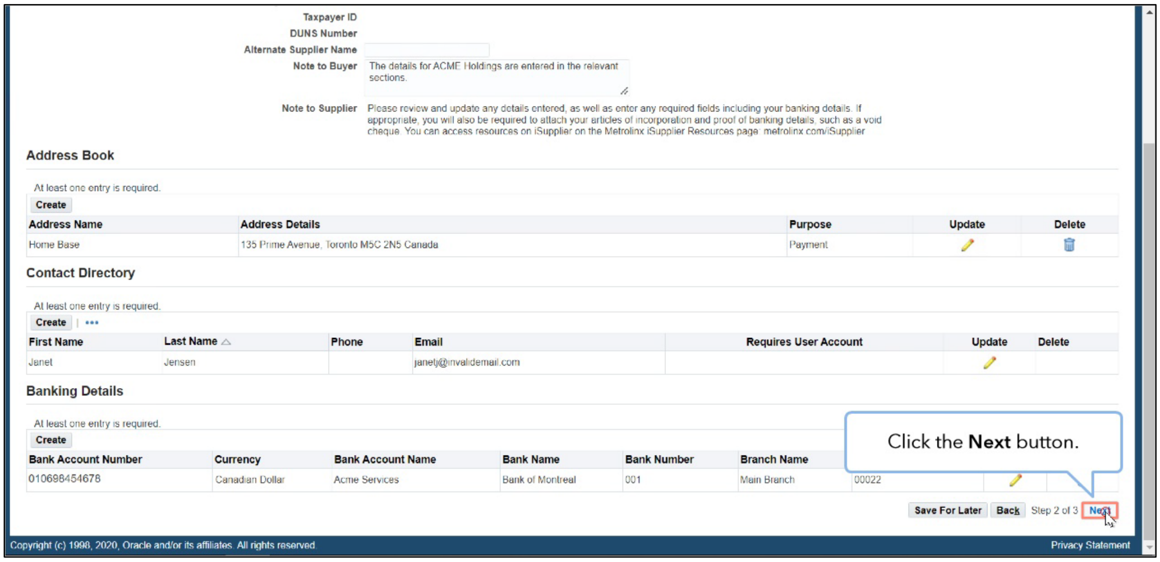
20. The **Prospective Supplier Registration: Additional Details** page displays again. Scroll down to view the **Banking Details** section.



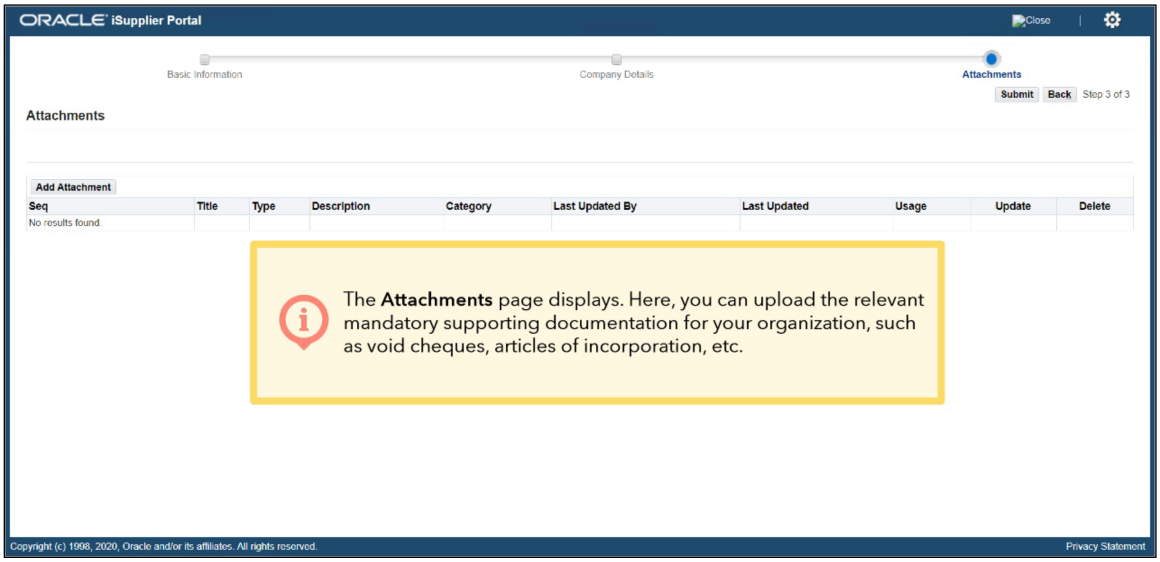
Note: The banking details added are saved in the **Banking Details** section.



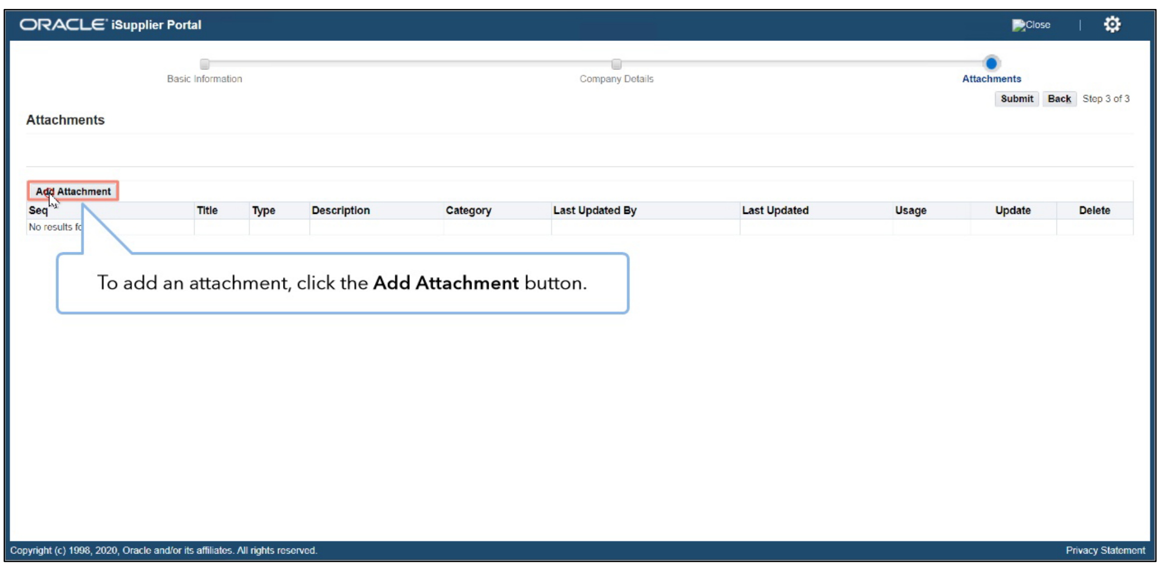
21. Click the **Next** button.



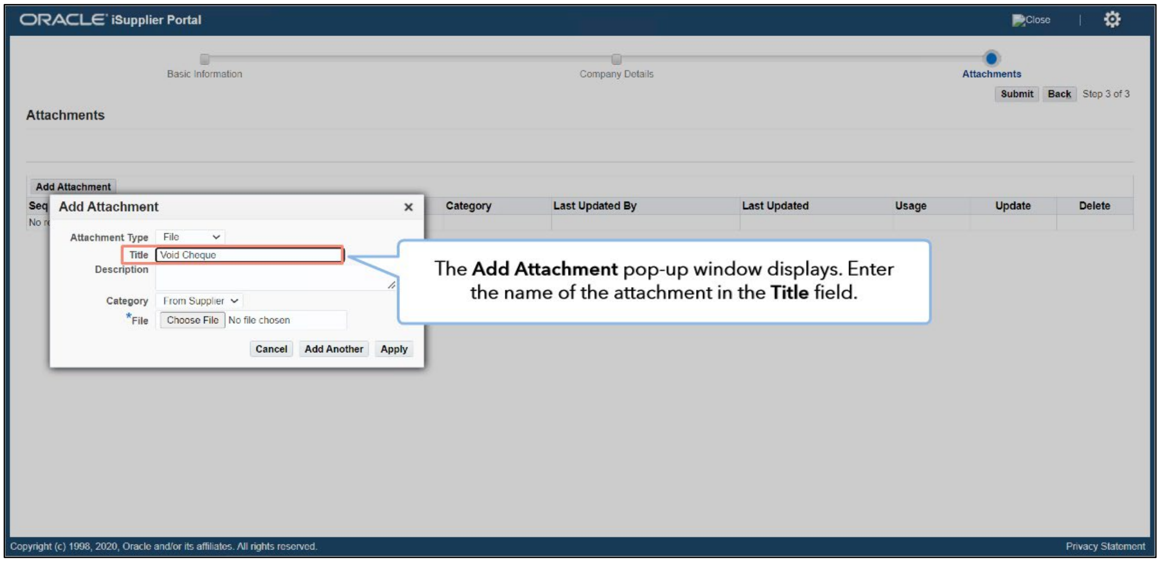
The **Attachments** page displays. Here, you can upload the relevant mandatory supporting documentation for your organization, such as void cheques, articles of incorporation, etc.



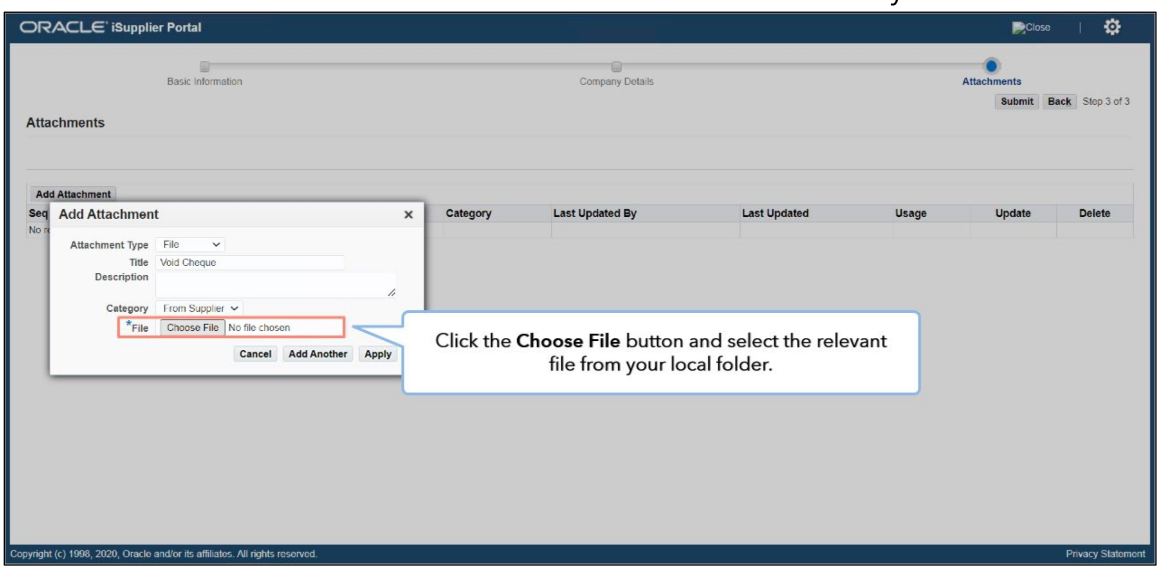
22. To add an attachment, click the **Add Attachment** button.



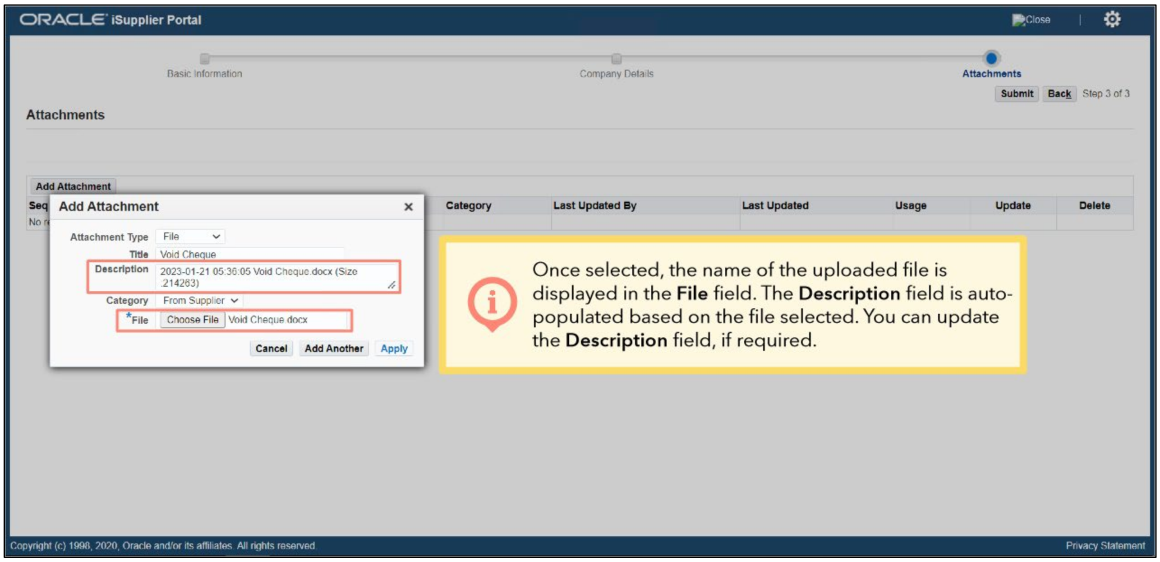
23. The **Add Attachment** pop-up window displays. Enter the name of the attachment in the **Title** field.



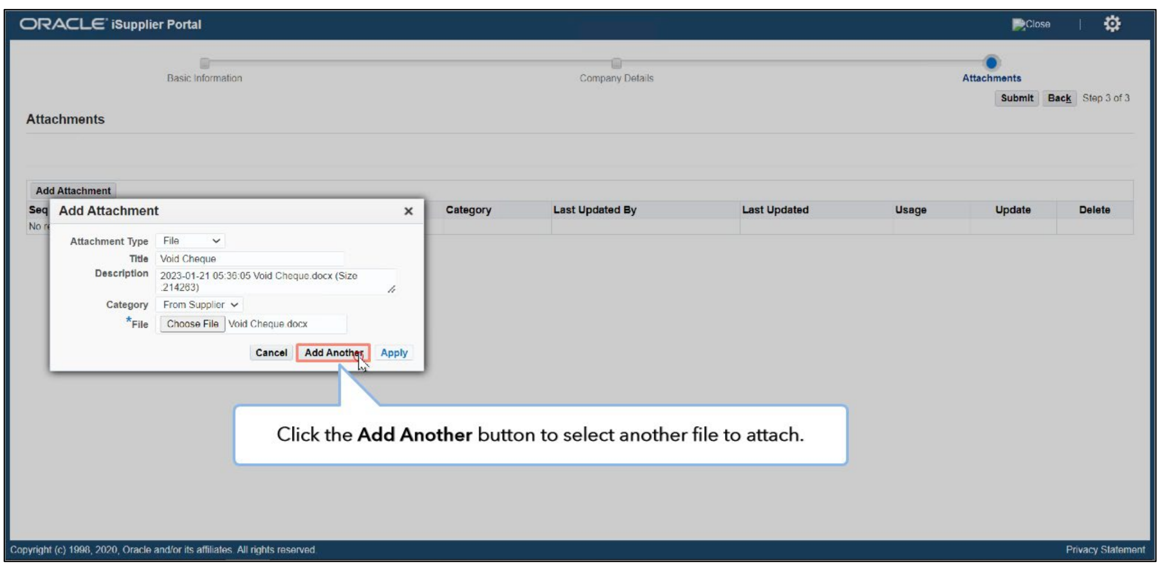
24. Click the **Choose File** button and select the relevant file from your local folder.



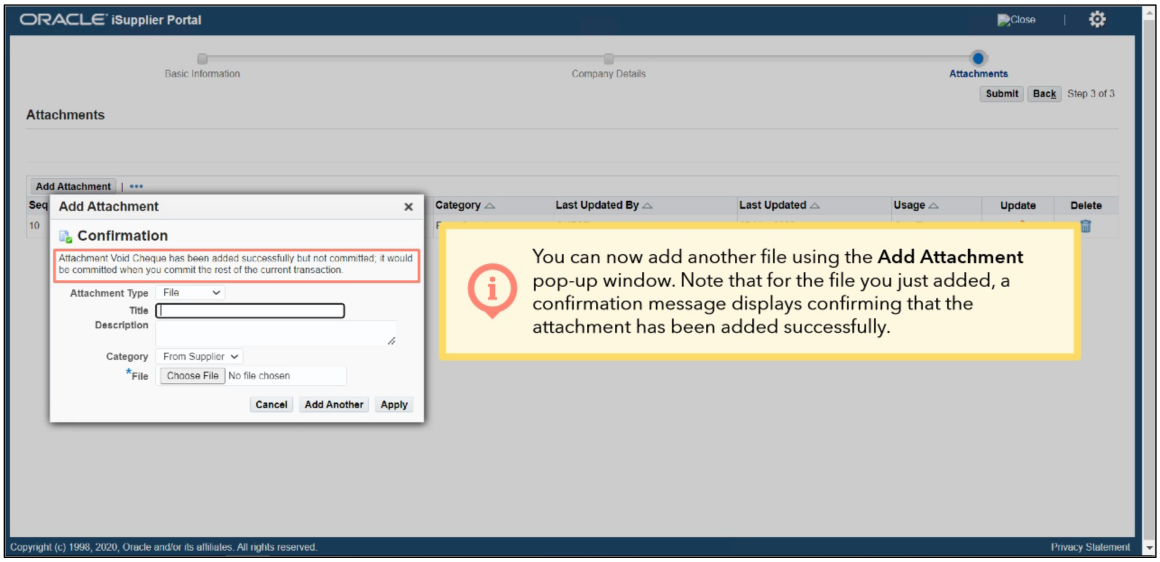
Once selected, the name of the uploaded file is displayed in the **File** field. The **Description** field is auto populated based on the file selected. You can update the **Description** field, if required.



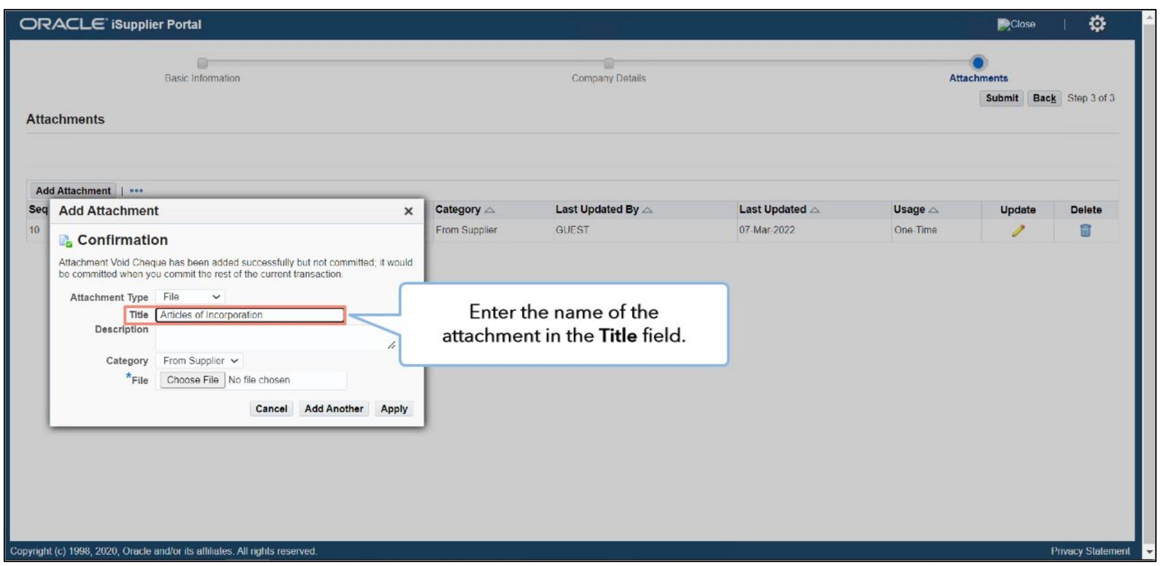
25. Click the **Add Another** button to select another file to attach.



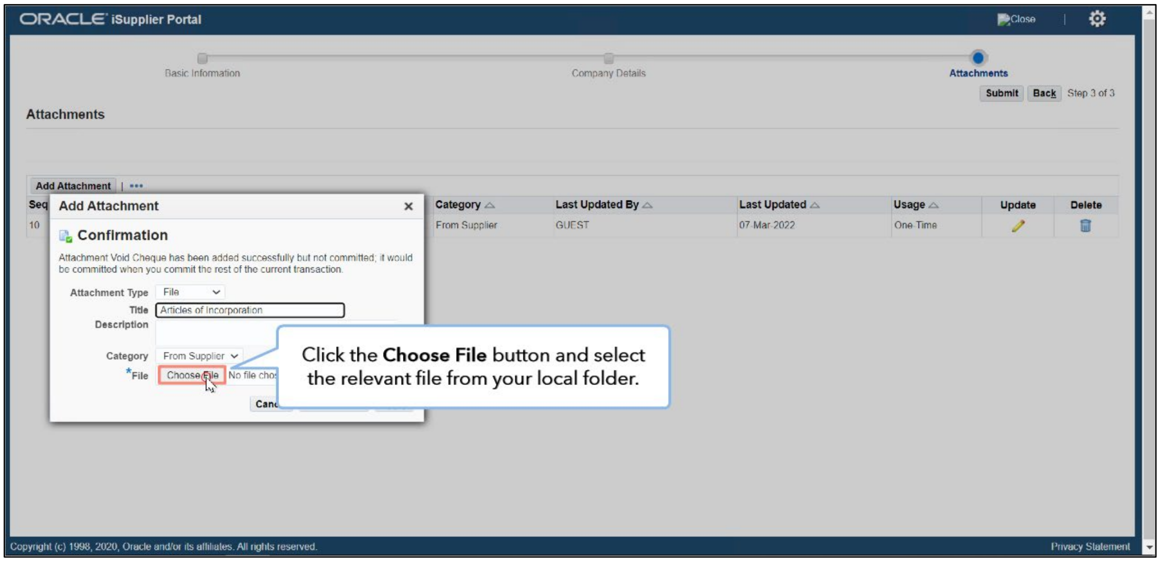
26. You can now add another file using the **Add Attachment** pop-up window. Note that for the file you just added, a confirmation message displays confirming that the attachment has been added successfully.



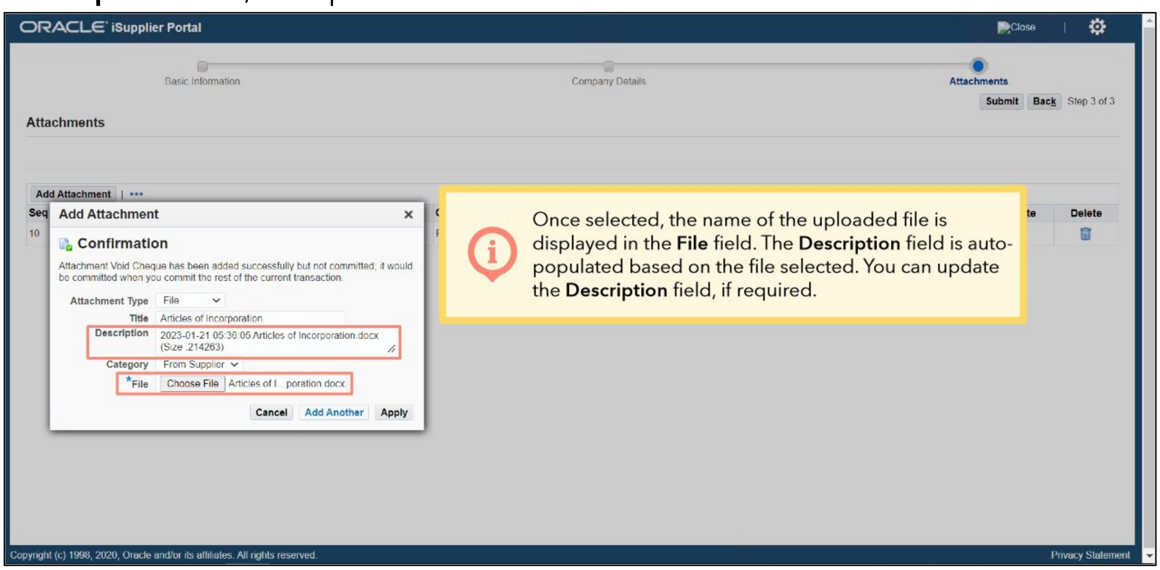
27. Enter the name of the attachment in the **Title** field.



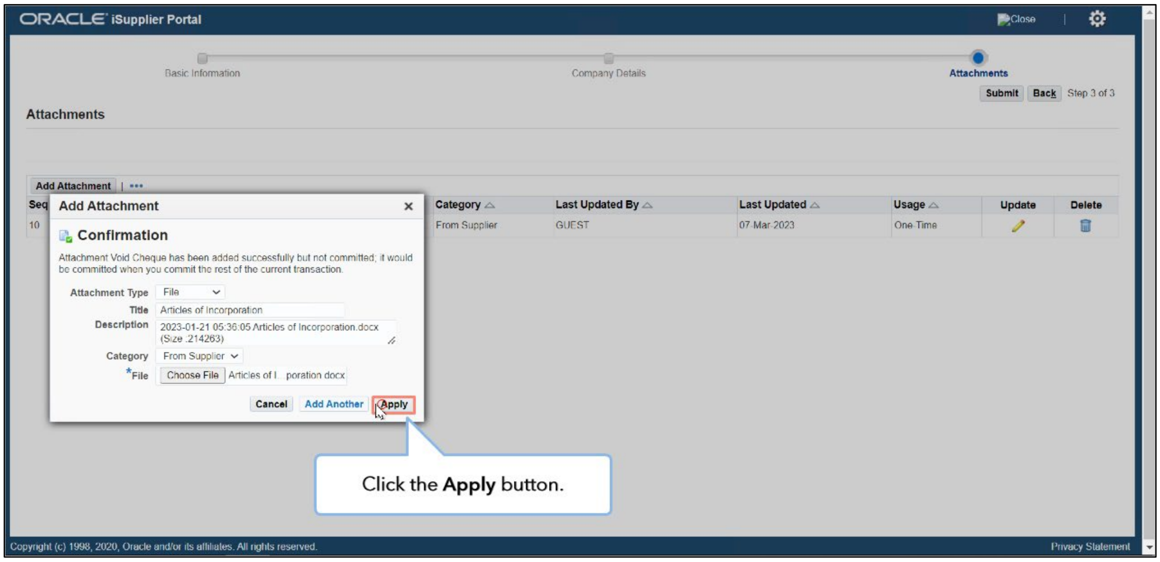
28. Click the **Choose File** button and select the relevant file from your local folder.



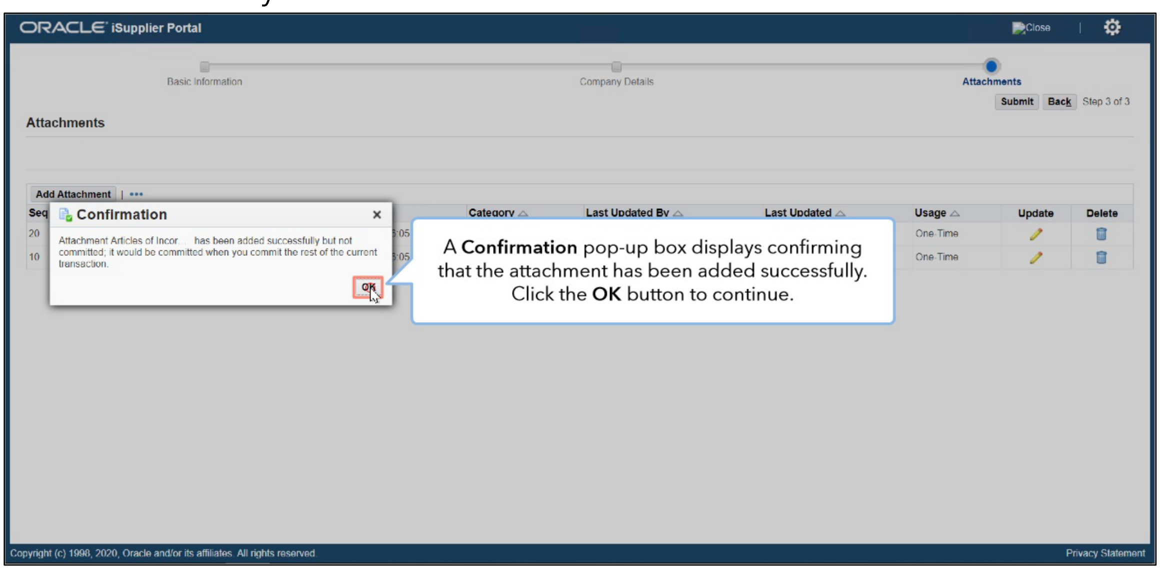
29. Once selected, the name of the uploaded file is displayed in the **File** field. The **Description** field is auto-populated based on the file selected. You can update the **Description** field, if required.



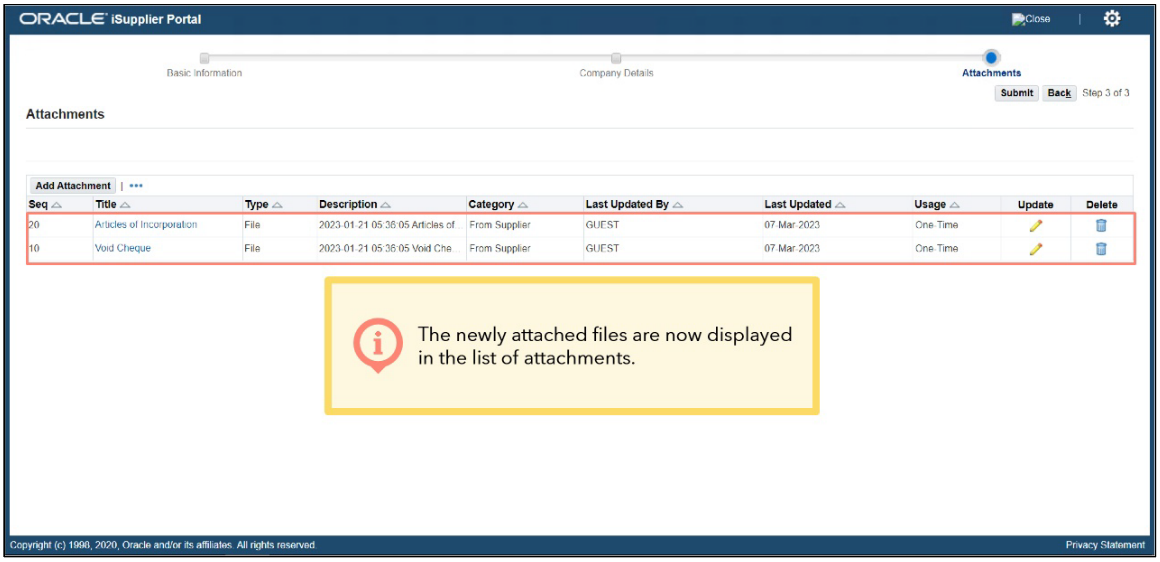
30. Click the **Apply** button.



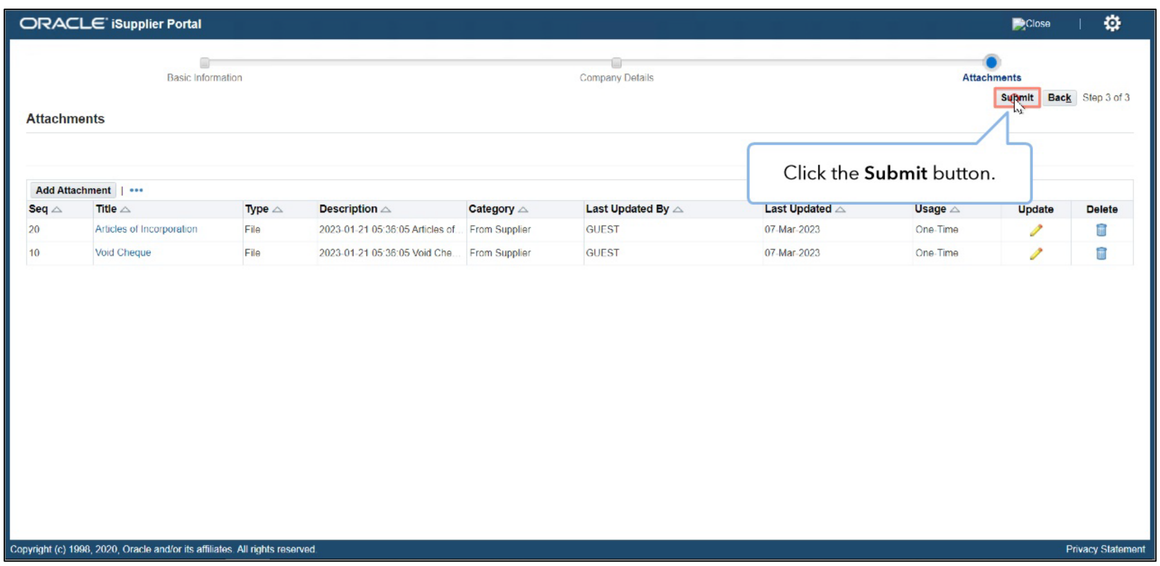
31. A **Confirmation** pop-up box displays confirming that the attachment has been added successfully. Click the **OK** button to continue.



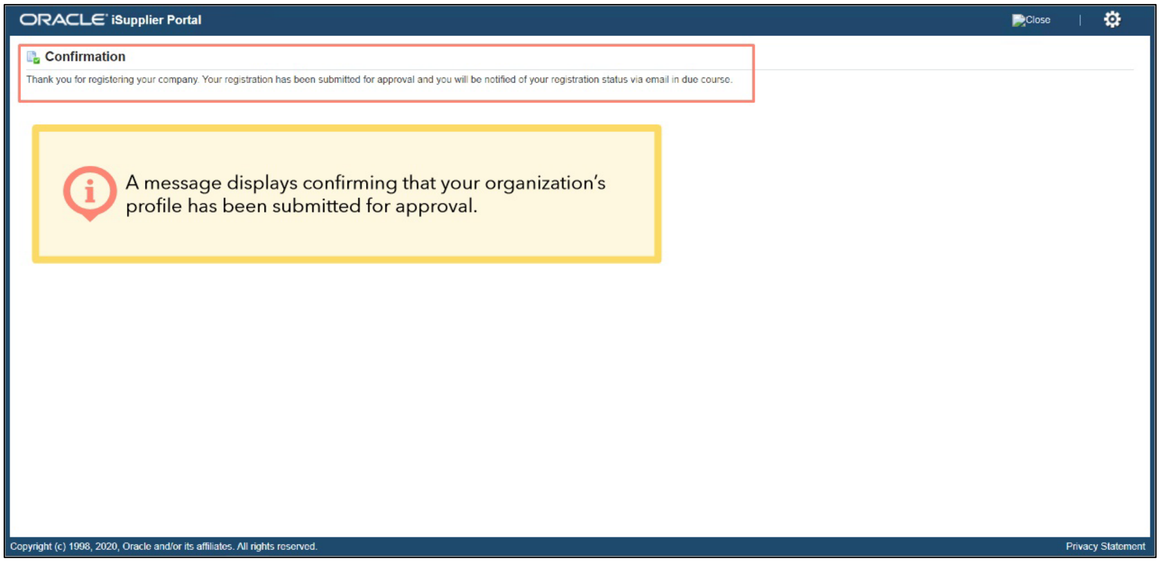
The newly attached files are now displayed in the list of attachments.



32. Click the **Submit** button.

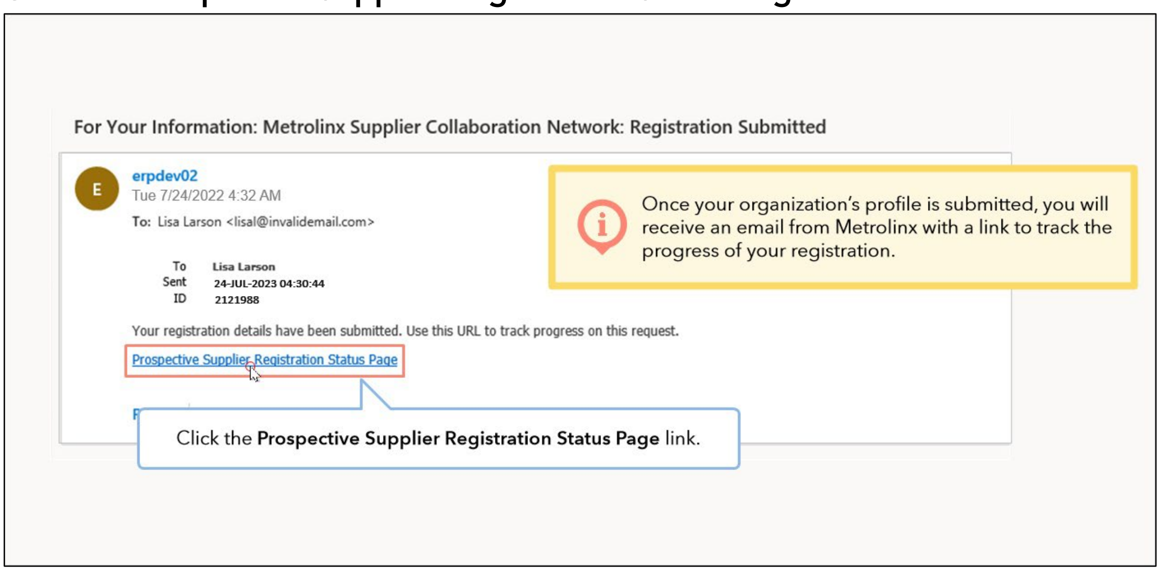


A message displays confirming that your organization's profile has been submitted for approval.



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

33. 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.

You will receive notifications via email once your profile and banking information have been approved in the system. Note that your invoice will only be processed once your profile and banking information have been approved.