



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.

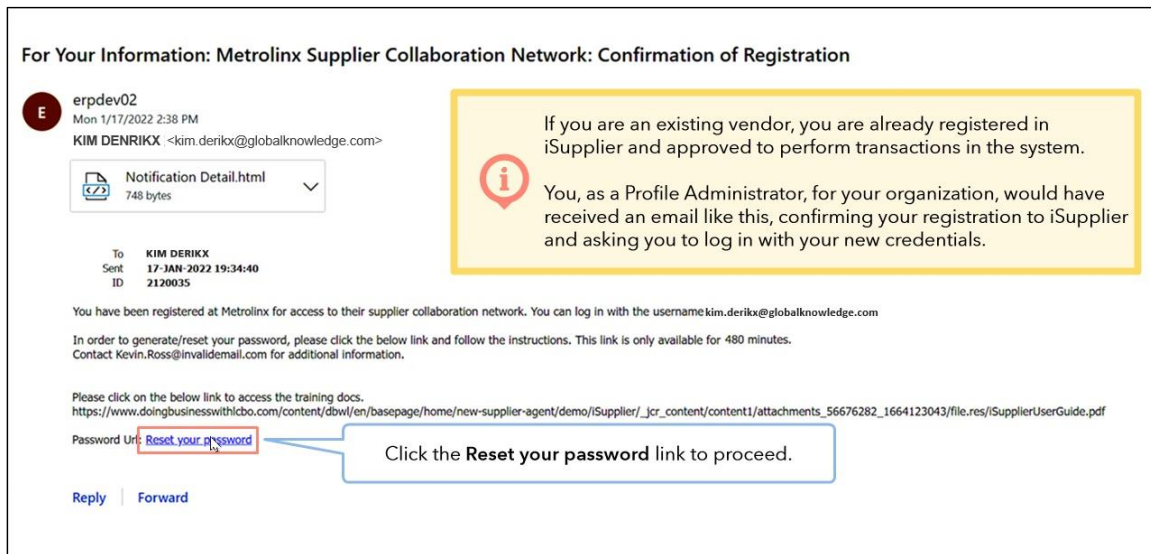
Manage Profile and Account Settings

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:

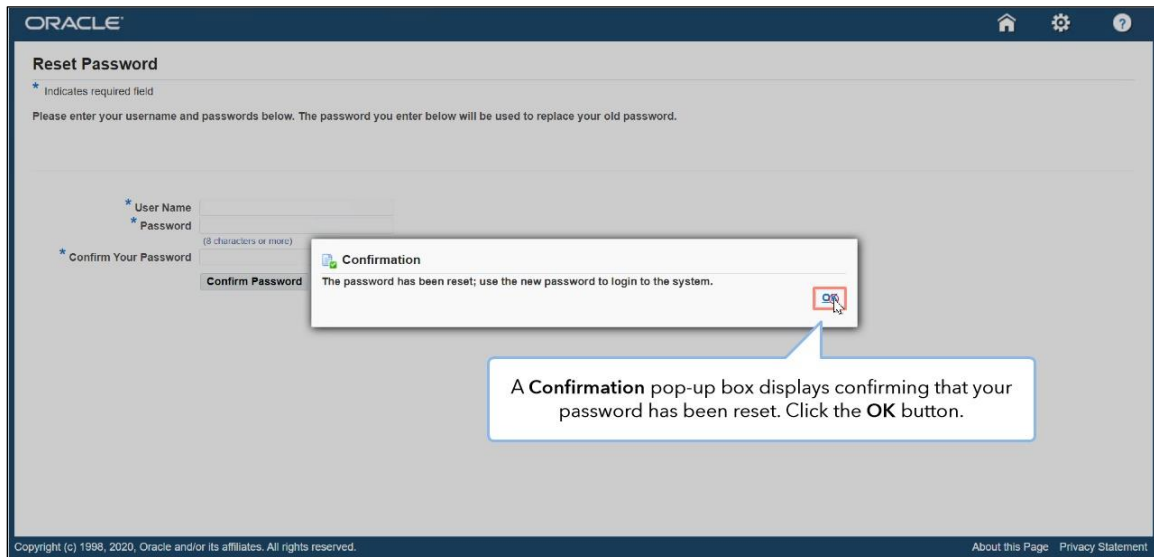
1. Click the **Reset your password** link to proceed.



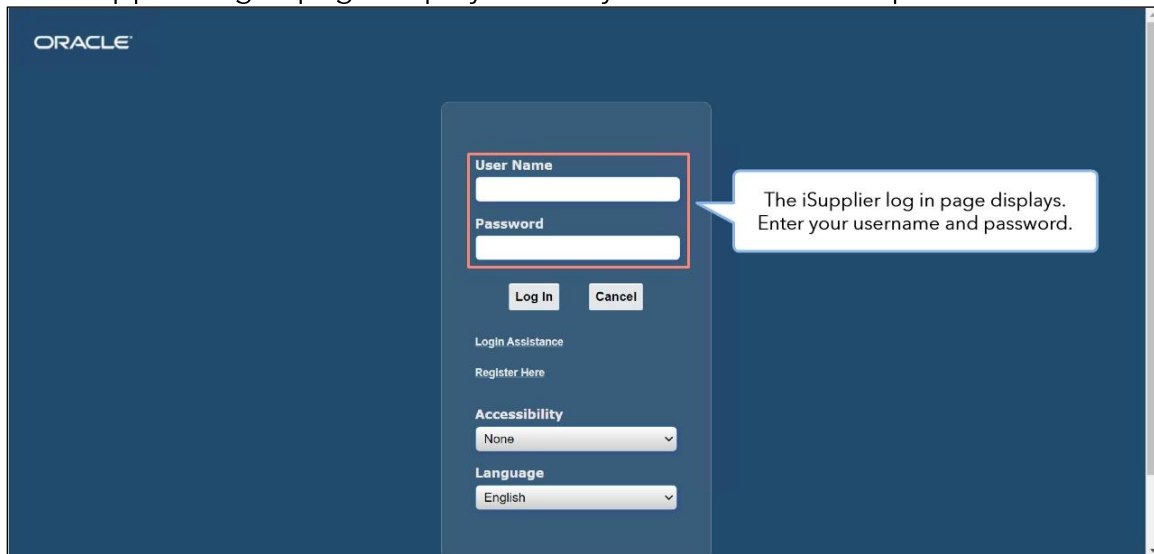
In this demonstration, the relevant fields are populated for you.

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

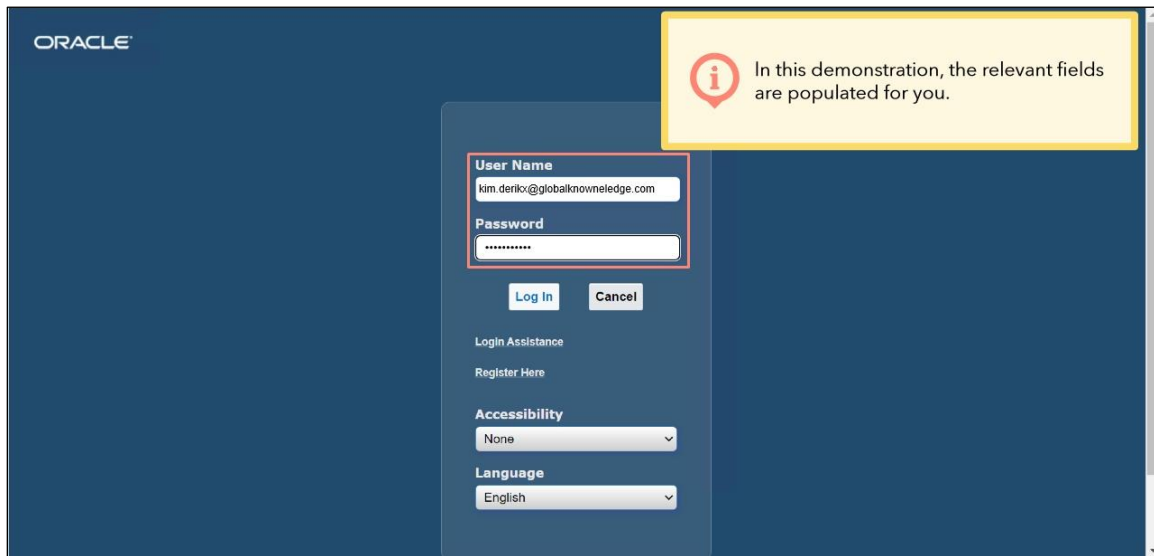
3. A **Confirmation** pop-up box displays confirming that your password has been reset. Click the **OK** button.



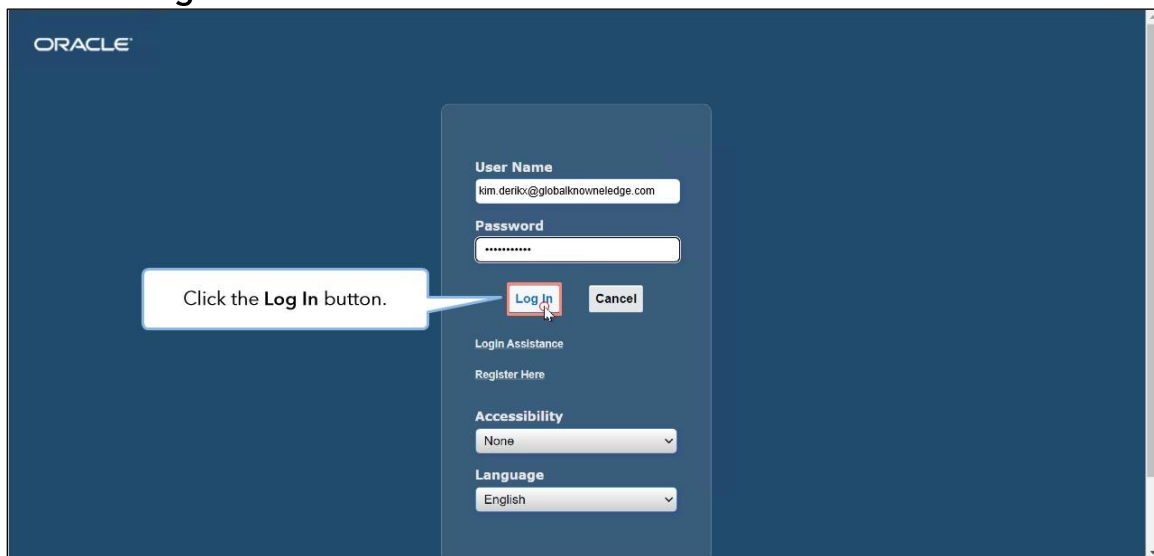
4. The iSupplier log in page displays. Enter your username and password.



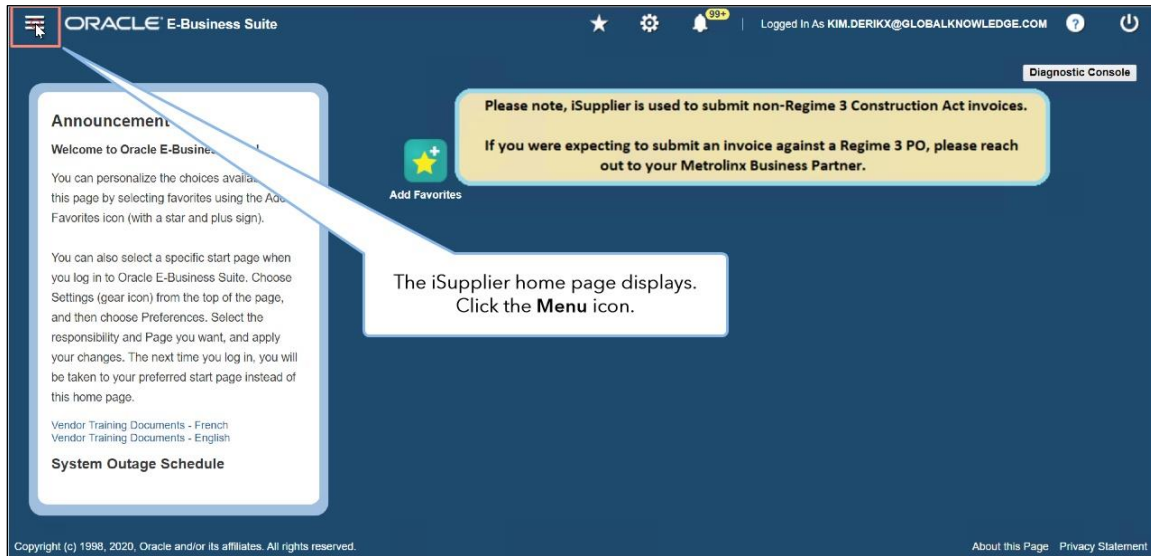
In this demonstration, the relevant fields are populated for you.



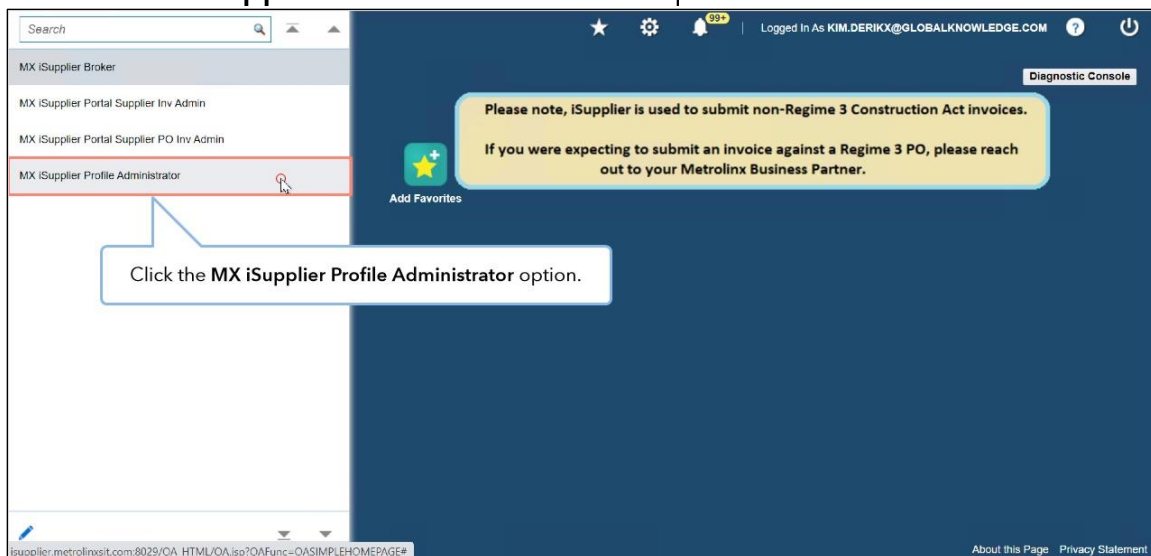
5. Click the **Log In** button.



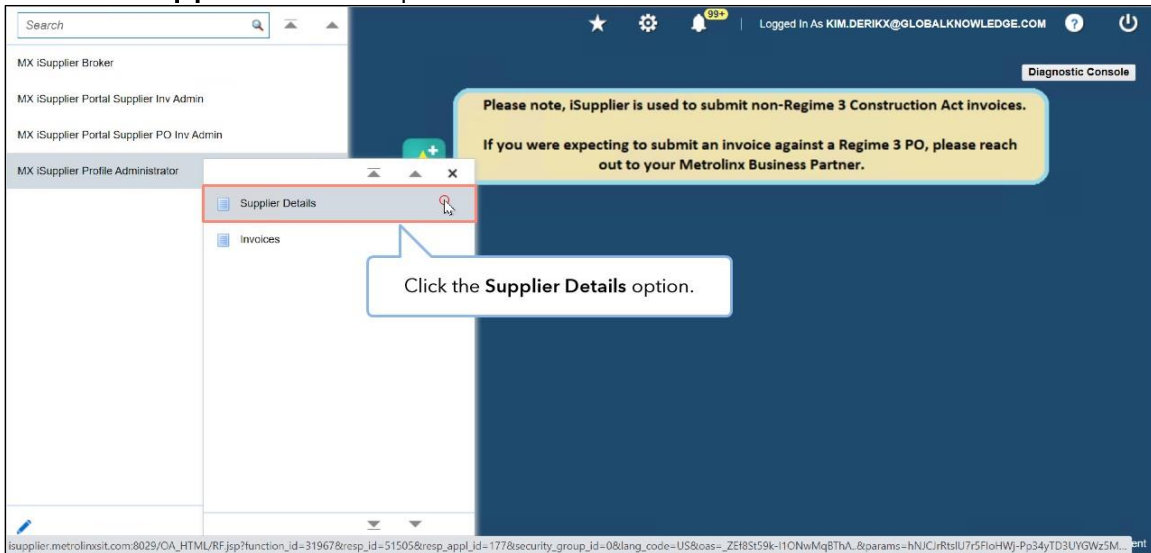
6. The iSupplier home page displays. Click the **Menu** icon.



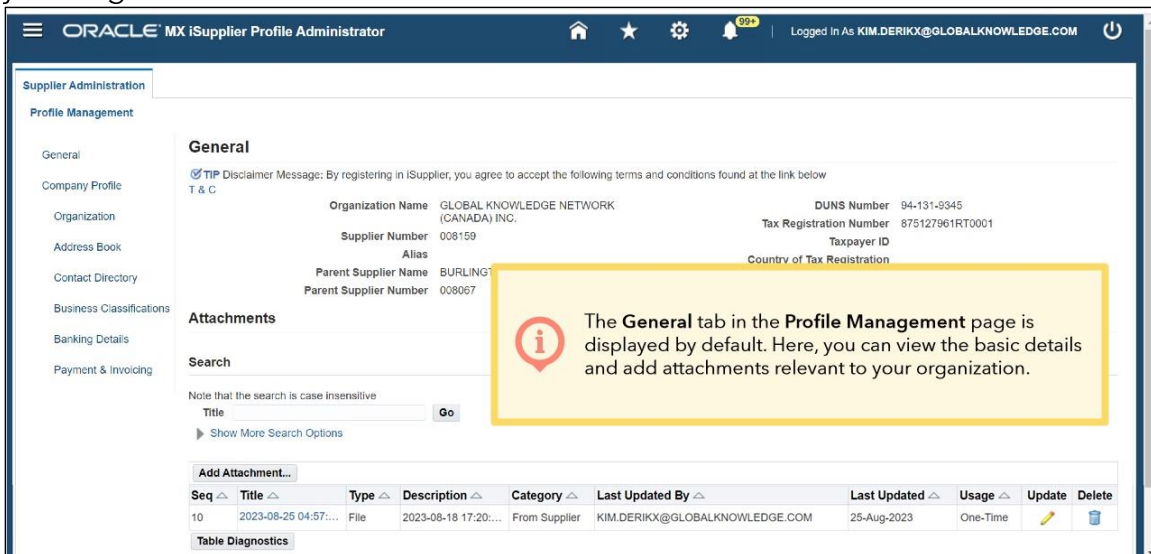
7. Click the **MX iSupplier Profile Administrator** option.



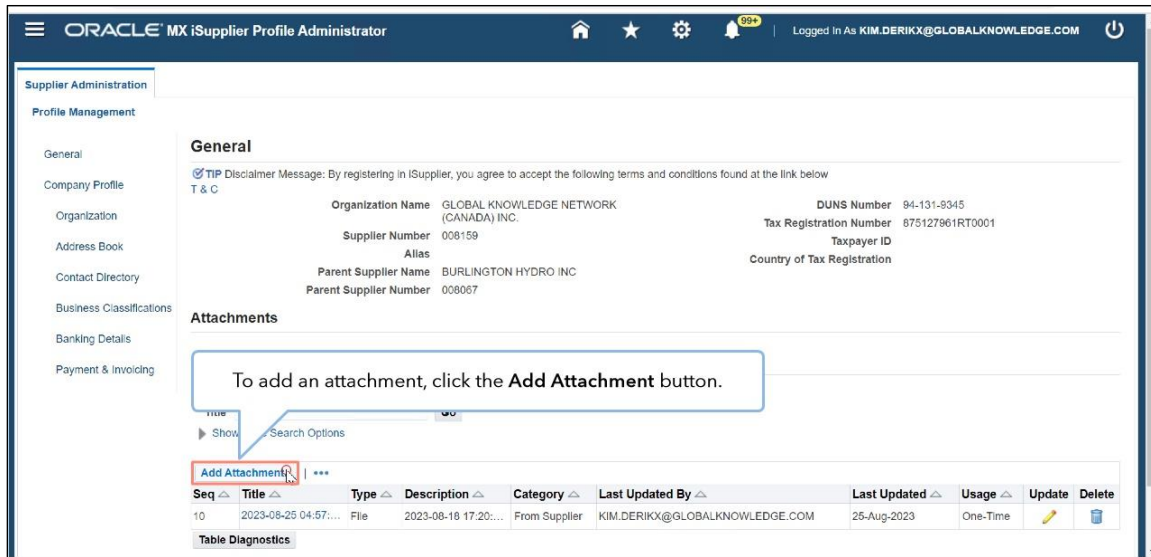
8. Click the **Supplier Details** option.



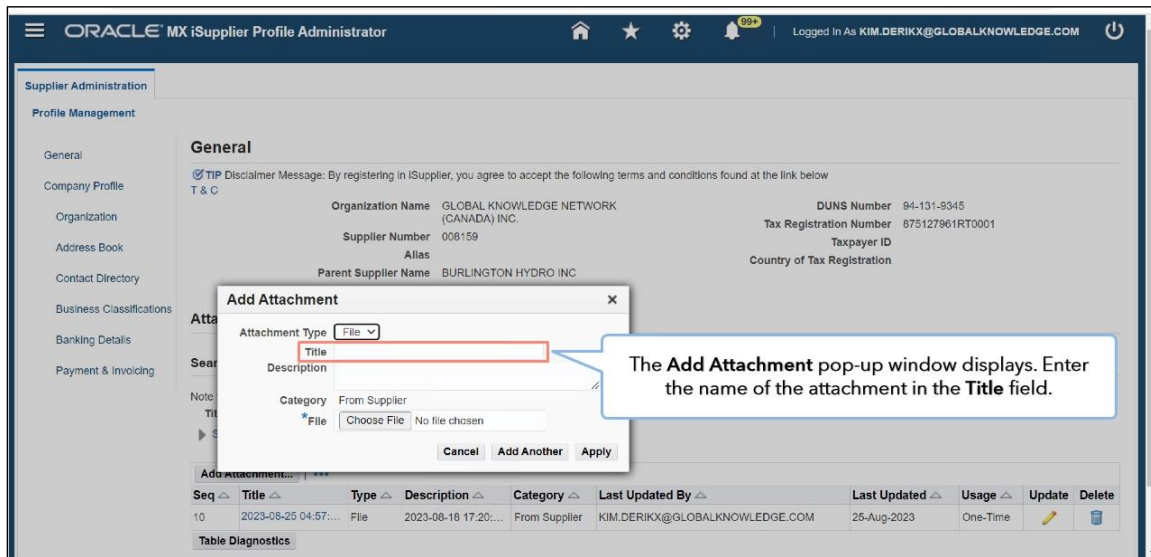
The **General** tab in the **Profile Management** page is displayed by default. Here, you can view the basic details and add attachments relevant to your organization.



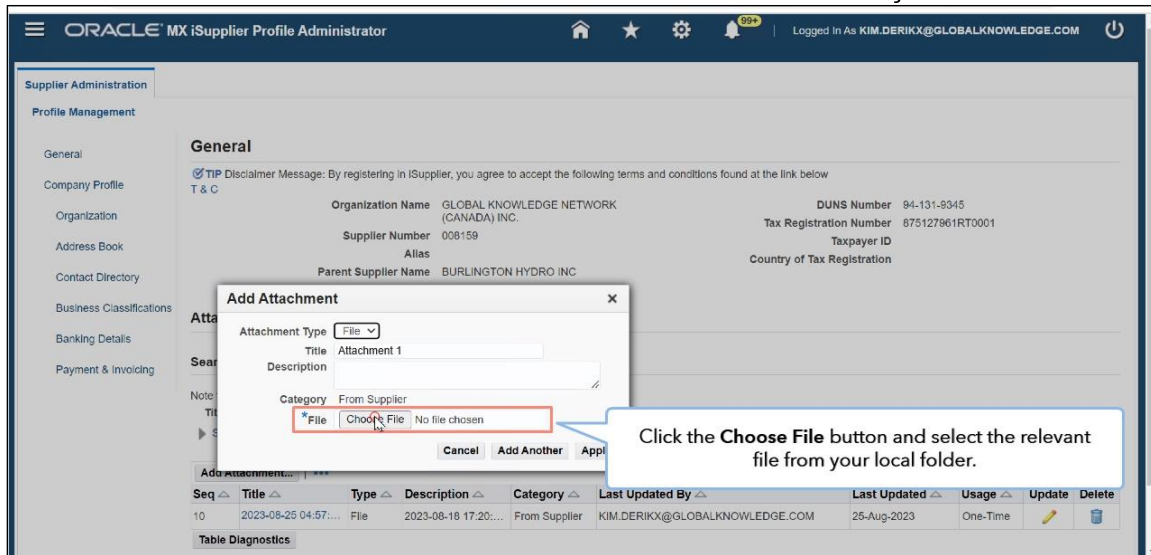
9. To add an attachment, click the **Add Attachment** button.



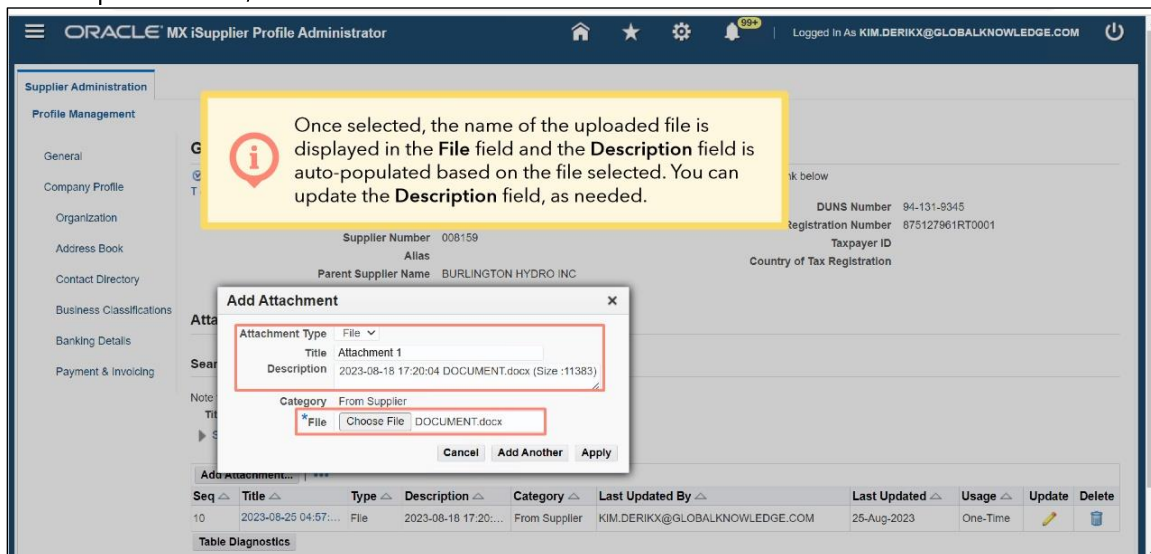
10. The **Add Attachment** pop-up window displays. Enter the name of the attachment in the **Title** field.



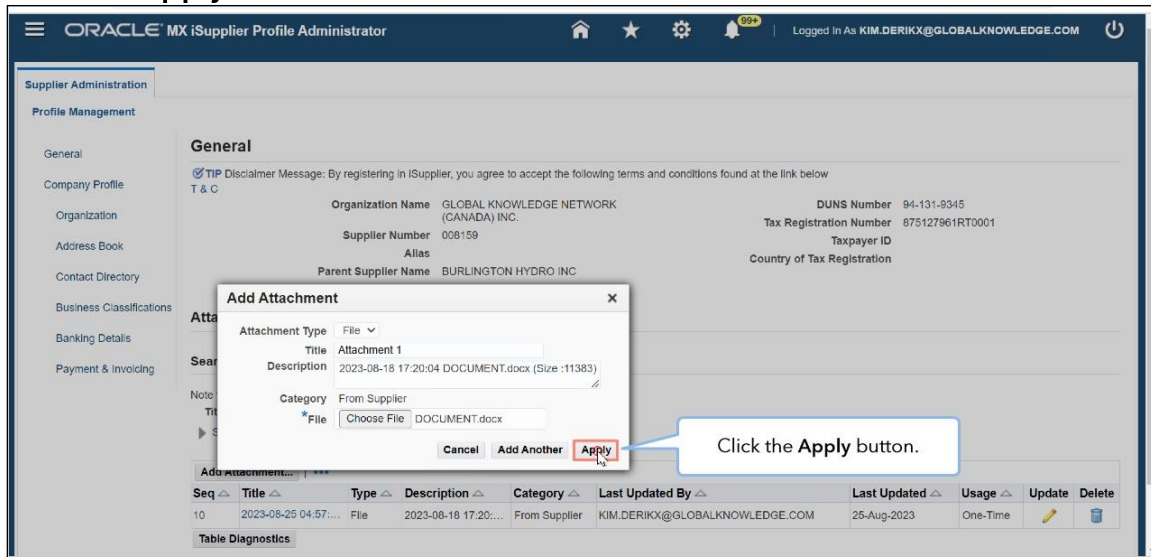
11. Click the **Choose File** button and select the relevant file from your local folder.



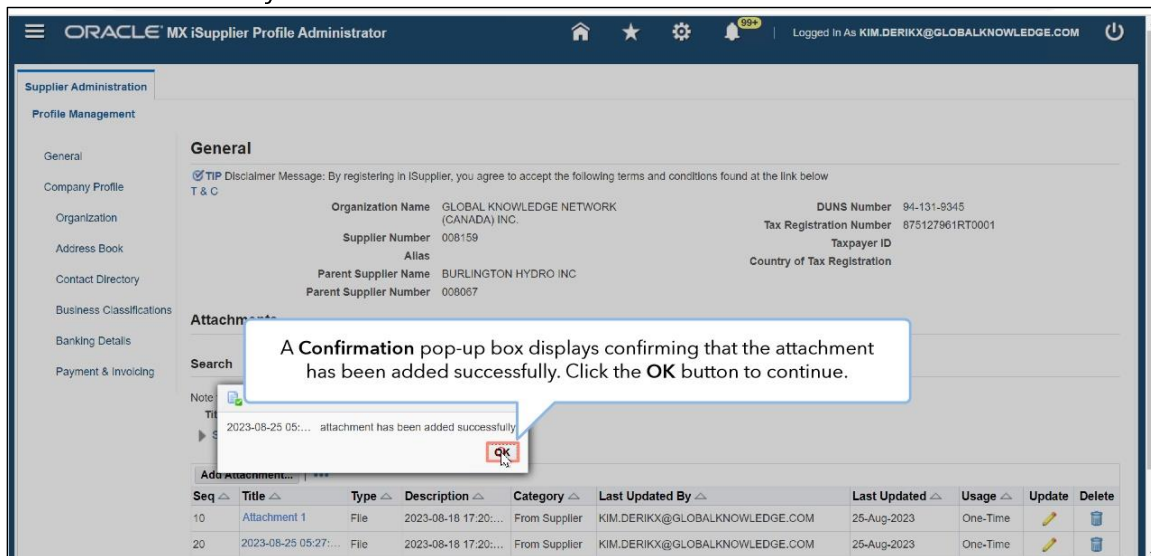
Once selected, the name of the uploaded file is displayed in the File field and the Description field is auto populated based on the file selected. You can update the Description field, as needed.



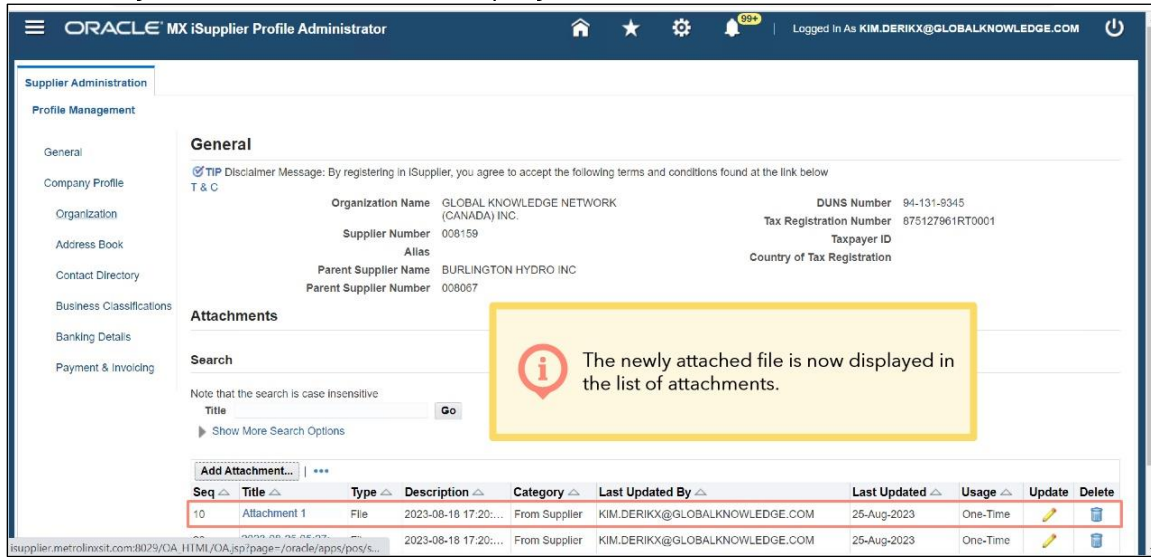
12. Click the **Apply** button.



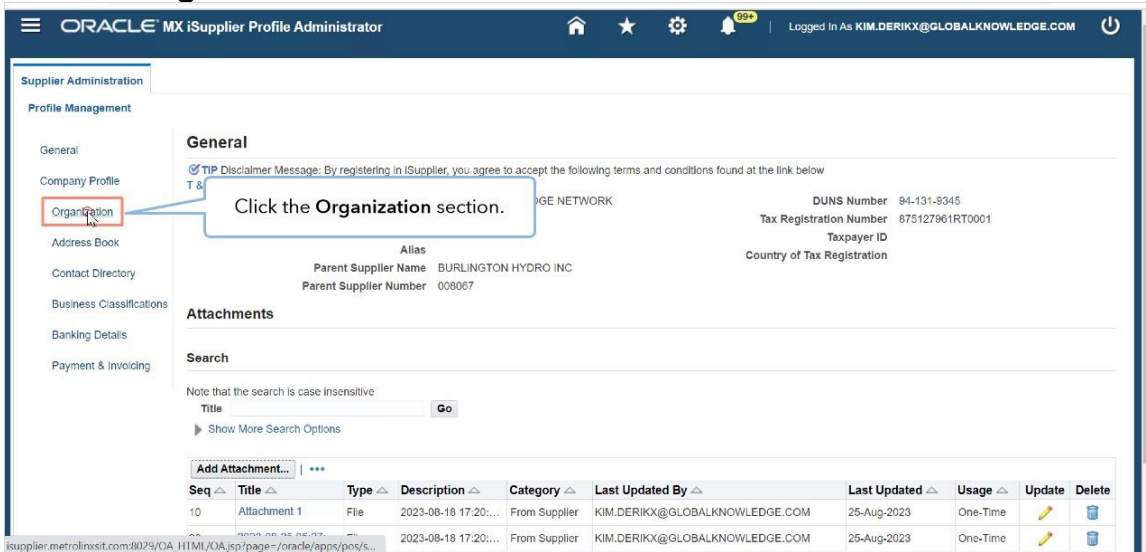
13. A **Confirmation** pop-up box displays confirming that the attachment has been added successfully. Click the **OK** button to continue.



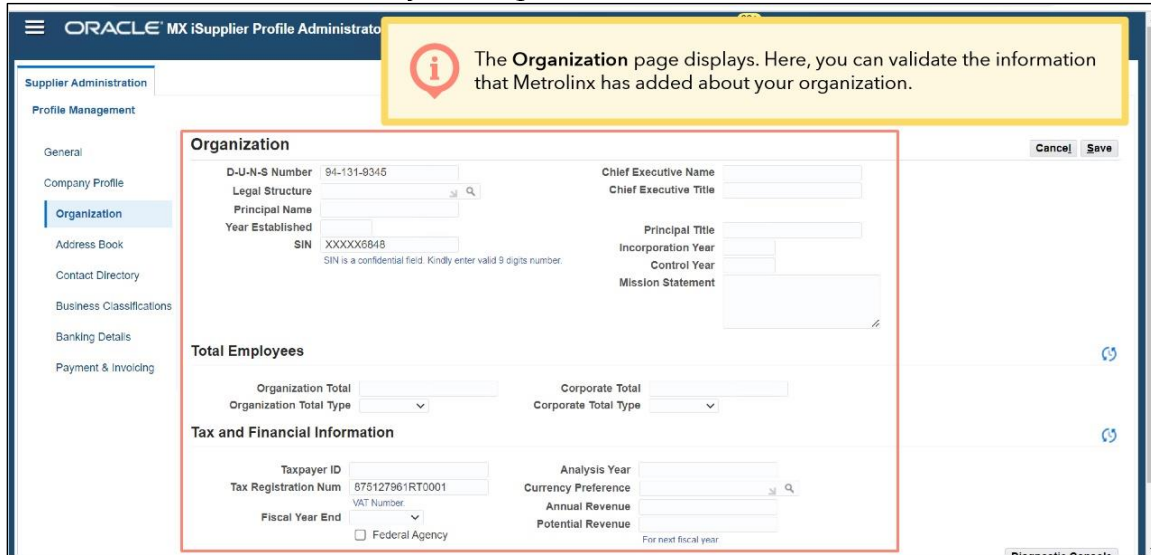
The newly attached file is now displayed in the list of attachments.



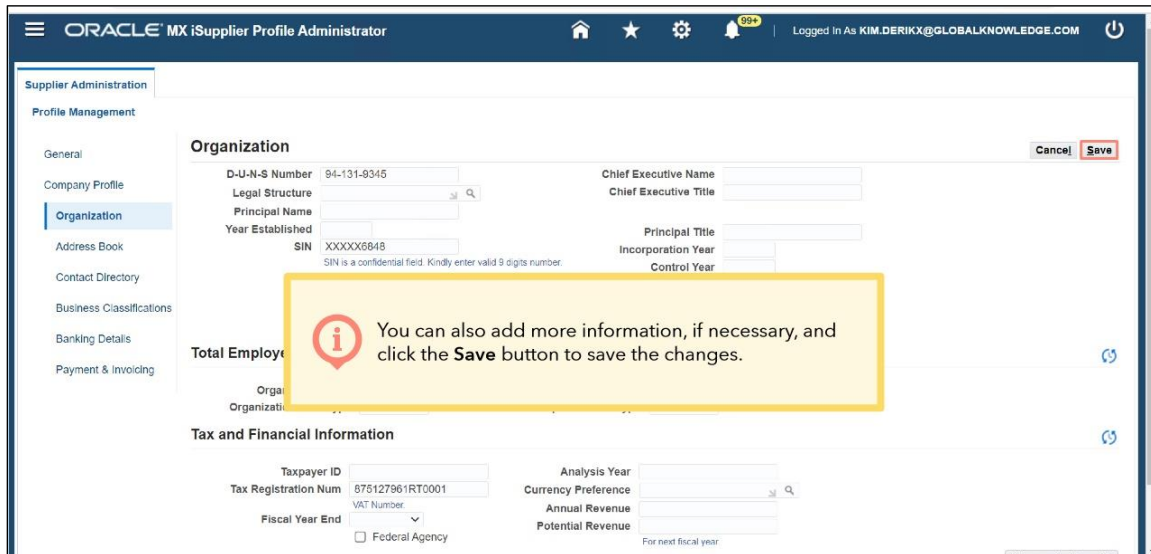
14. Click the **Organization** section.



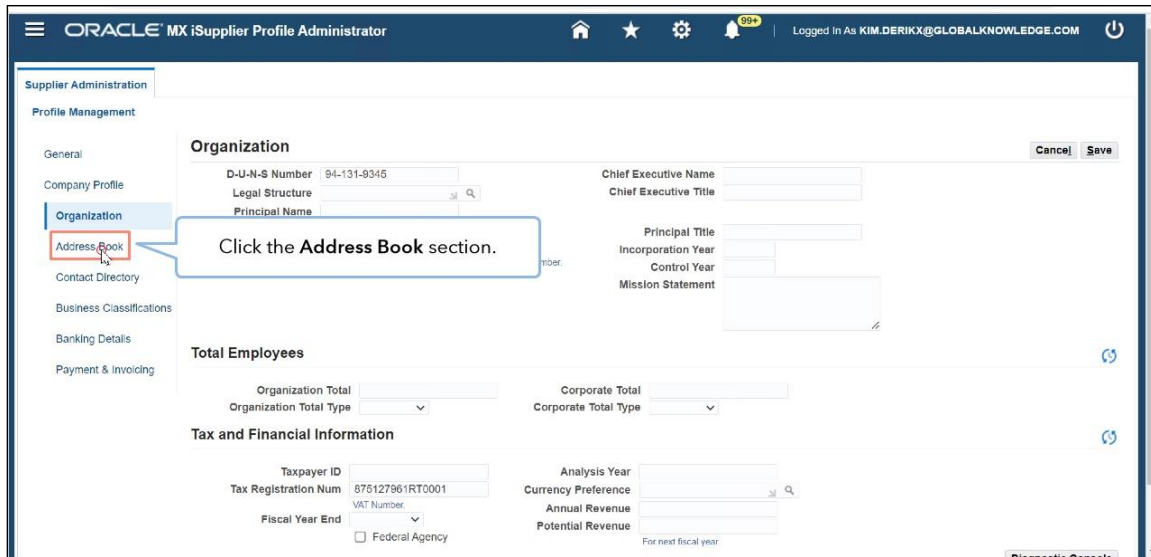
The **Organization** page displays. Here, you can validate the information that Metrolinx has added about your organization.



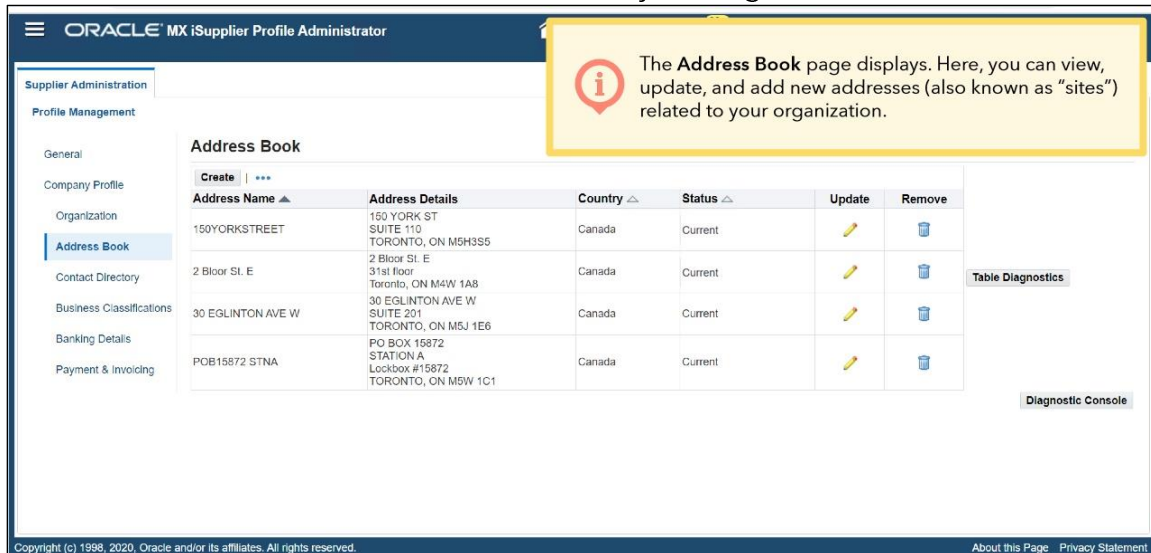
You can also add more information, if necessary, and click the **Save** button to save the changes.



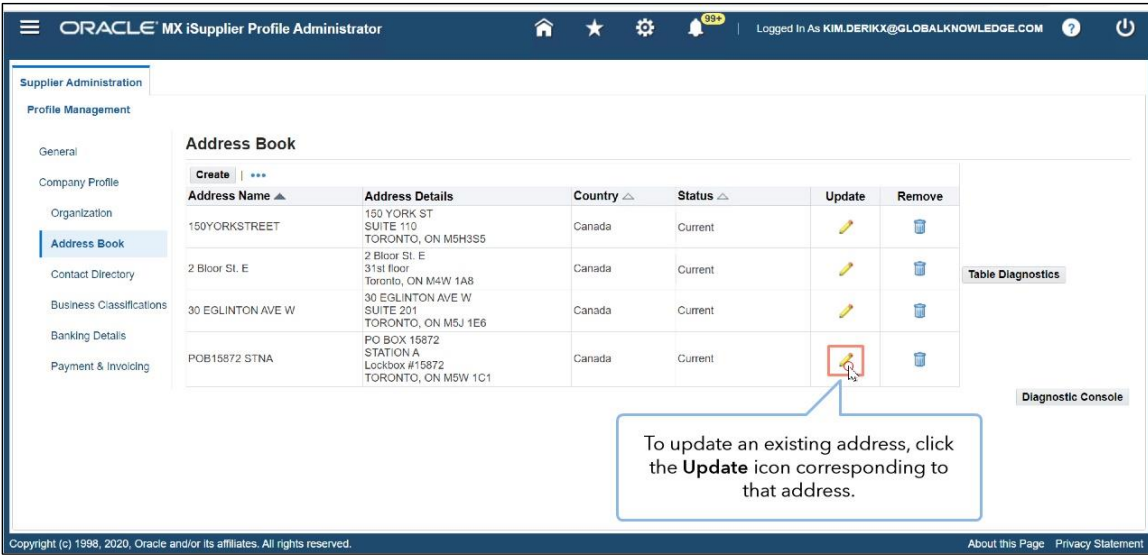
15. Click the **Address Book** section.



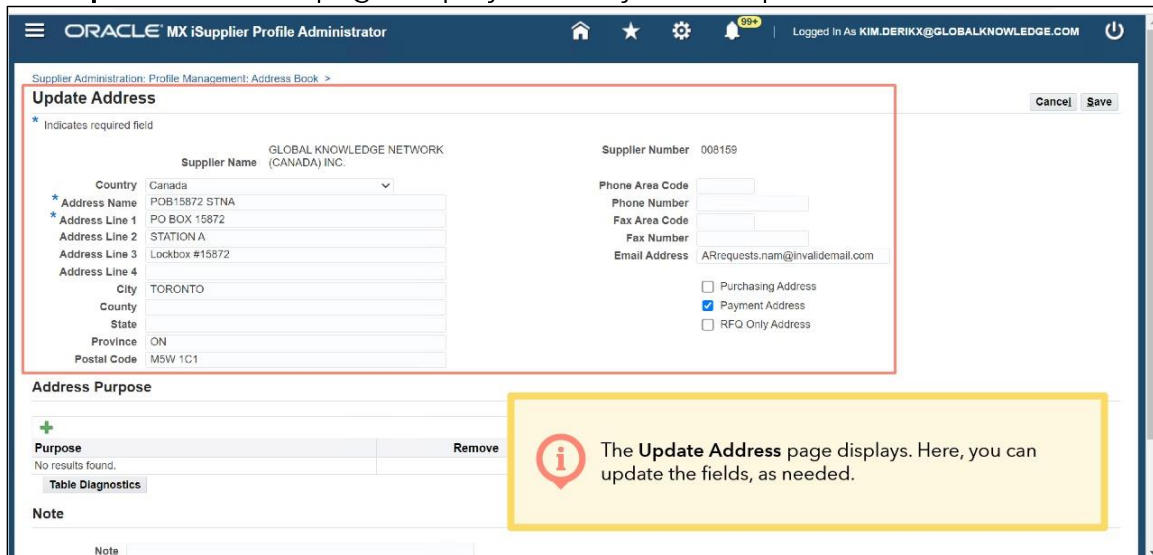
The **Address Book** page displays. Here, you can view, update, and add new addresses (also known as "sites") related to your organization.



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.

Supplier Administration: Profile Management: Address Book >

Update Address

Cancel Save

* Indicates required field

Supplier Name: GLOBAL KNOWLEDGE NETWORK (CANADA) INC. Supplier Number: 008159

Country: Canada

* Address Name: POB15872 STNA

* Address Line 1: PO BOX 15872

Address Line 2: STATION A

Address Line 3: Lockbox #15872

Address Line 4:

City: TORONTO

County:

State:

Province: ON

Postal Code: M5W 1C1

Phone Area Code:

Phone Number:

Fax Area Code:

Fax Number:

Email Address: ARrequests.nam@invalidemail.com

Purchasing Address

Payment Address

RFQ Only Address

Address Purpose

+ Purpose: No results found. Remove

Table Diagnostics

Note

Note

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.

Supplier Name: (CANADA) INC.

Country: Canada

* Address Name: POB15872 STNA

* Address Line 1: PO BOX 15872

Address Line 2: STATION A

Address Line 3: Lockbox #15872

Address Line 4:

City: TORONTO

County:

State:

Province: ON

Postal Code: M5W 1C1

Phone Area Code:

Phone Number:

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.

Address Purpose

+ Purpose: No results found. Remove

Table Diagnostics

Note

Note

Include any additional details about the address such as the type of address. This will be visible to other buyers within your organization as well as to the supplier. Also, include brief notes to buyer about the change when changing address information.

Diagnostic Console

Cancel Save

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

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.

The screenshot shows a web form for managing a supplier's address. The form includes fields for Country, Address Name, Address Lines 1-4, City, County, State, Province, and Postal Code. It also has fields for Phone Area Code, Phone Number, Fax Area Code, Fax Number, and Email Address. There are three checkboxes: Purchasing Address, Payment Address (which is checked), and RFQ Only Address. Below these fields is the 'Address Purpose' section, which contains a table with a 'Purpose' column and a 'Remove' button. A yellow callout box with an information icon (i) contains the text: '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.' At the bottom right of the form are buttons for 'Diagnostic Console', 'Cancel', and 'Save'.

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

This screenshot is identical to the one above, but with a blue callout box highlighting the Plus icon (+) in the 'Address Purpose' section. The callout box contains the text: 'To add the purpose of the address, click the Plus icon in the Address Purpose section.' The rest of the form and its elements are the same as in the previous image.

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

The screenshot shows a web form for 'Supplier Name (CANADA) INC.'. The form includes fields for Country (Canada), Address Name (POB15872 STNA), Address Line 1 (PO BOX 15872), Address Line 2 (STATION A), Address Line 3 (Lockbox #15872), Address Line 4, City (TORONTO), County, State, Province (ON), and Postal Code (M5W 1C1). There are also fields for Phone Area Code, Phone Number, Fax Area Code, Fax Number, and Email Address (ARrequests.nam@invalidemail.com). A 'Purpose' dropdown menu is open, showing 'Acknowledgments' selected. A callout box points to the dropdown arrow with the text: 'The Purpose drop-down menu displays. Click the drop-down arrow to view the list of options.' Below the dropdown is a 'Table Diagnostics' button and a 'Note' field. At the bottom right, there are 'Diagnostic Console', 'Cancel', and 'Save' buttons.

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

The screenshot shows the same web form as in the previous image, but the 'Purpose' dropdown menu is now open, displaying a scrollable list of options. The list includes: Acknowledgments, Address Book Address, Administered By, Bills of lading, Collateral Mail To, Authorizations, Claims, Bill To, Business, Birthplace, Correspondence, Customer Region, Discharge Planning, Eligibility, Exchange Billing, Credit Card Billing, Credit Memos, Drawee, Deliver To, Distribution Center, and Acknowledgments. A 'Remove' button is visible next to the 'Acknowledgements' option at the bottom of the list. A callout box points to the list with the text: 'The list of options is displayed. Scroll down to view the complete list.' The rest of the form, including the 'Table Diagnostics' button and 'Note' field, remains the same. At the bottom right, there are 'Diagnostic Console', 'Cancel', and 'Save' buttons.

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

The screenshot shows a web form for a supplier named '(CANADA) INC.'. The form includes fields for Country (Canada), Address Name (POB15872 STNA), Address Line 1 (PO BOX 15872), Address Line 2 (STATION A), Address Line 3 (Lockbox #15872), Address Line 4, City (TORONTO), County, State, Province (ON), and Postal Code (MSW 1C1). There are also fields for Phone Area Code, Phone Number, Fax Area Code, Fax Number, and Email Address (ARrequests.nam@invalidemail.com). Under 'Address Purpose', there are checkboxes for 'Purchasing Address', 'Payment Address' (which is checked), and 'RFQ Only Address'. Below this is a table with a 'Purpose' column and a 'Remove' column. The 'Purpose' dropdown is set to 'Address Book Address' and is highlighted with a red box. A callout box with a blue border points to this dropdown, containing the text: '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.

This screenshot is identical to the previous one, but with a red box around the 'Note' field. A callout box with a blue border points to this field, containing the text: '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.

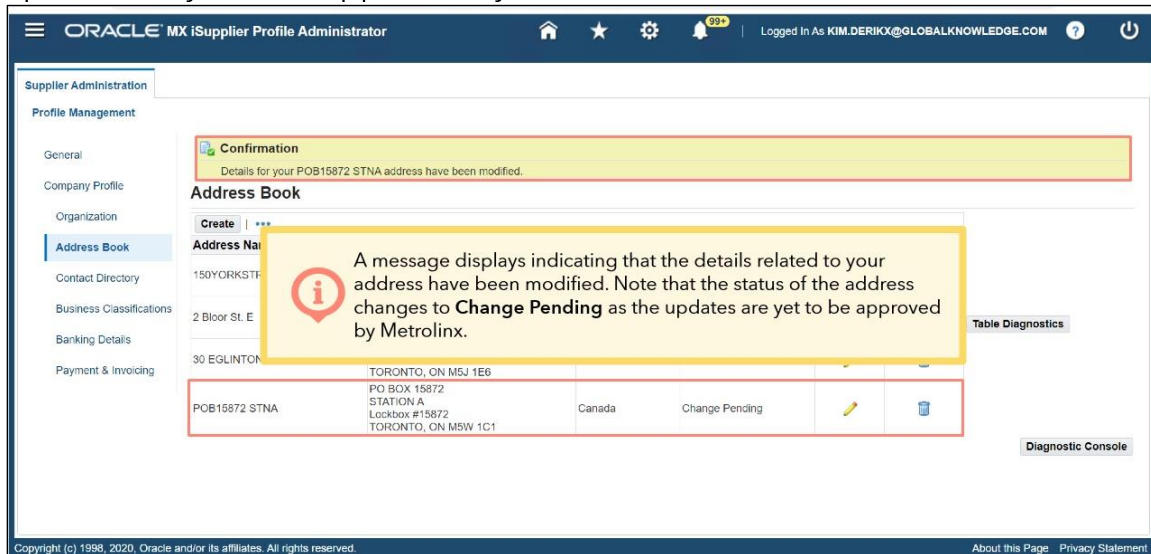
What you enter in this field will be visible to other contacts within your organization as well as to Metrolinx.

The screenshot shows a form for managing a supplier's address. The form includes fields for Country, Address Name, Address Line 1-4, City, County, State, Province, and Postal Code. It also has fields for Phone Area Code, Phone Number, Fax Area Code, Fax Number, and Email Address. There are checkboxes for Purchasing Address, Payment Address (which is checked), and RFQ Only Address. A yellow callout box with an information icon contains the text: "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." The Note field contains the text: "Address purpose changed to 'Address Book Address'".

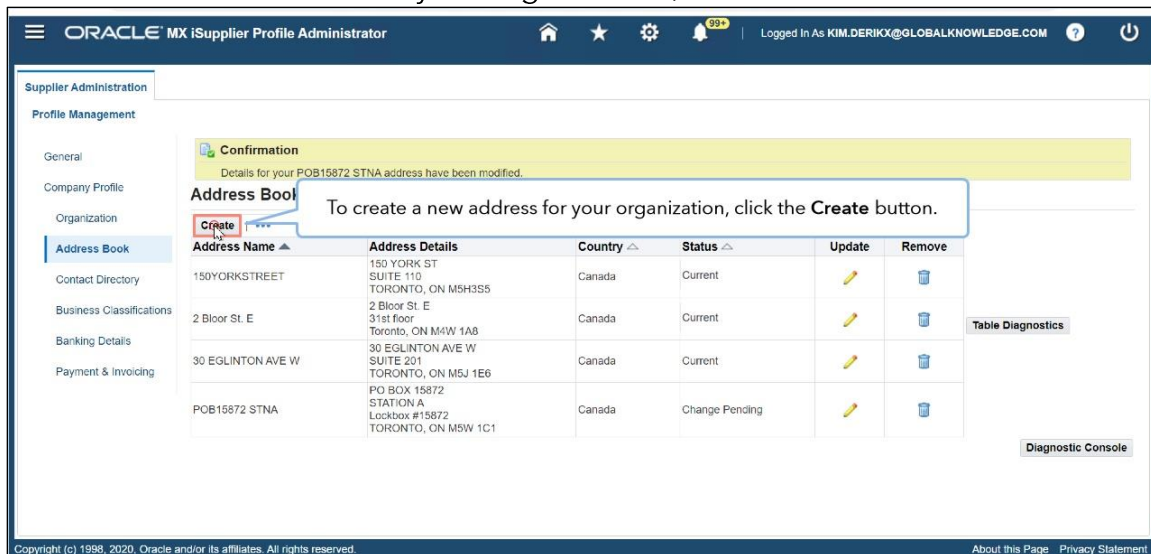
23. Click the **Save** button to save your updates.

This screenshot is identical to the previous one, but with a blue callout box pointing to the **Save** button. The callout box contains the text: "Click the **Save** button to save your updates." The Note field still contains the text: "Address purpose changed to 'Address Book Address'".

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.

Supplier Administration: Profile Management: Address Book >

Create Address

Supplier Name: GLOBAL KNOWLEDGE NETWORK (CANADA) INC. Supplier Number: 008159

Country: Canada
Address Name: TRADE BUILDING
Address Line 1: 506 PACIFIC STREET
Address Line 2:
Address Line 3:
Address Line 4:
City:
County:
State: VANCOUVER
Province: ON
Postal Code:

Phone Area Code:
Phone Number:
Fax Area Code:
Fax Number:
Email Address:

Purchasing Address
 Payment Address

Select the **Purchasing Address** check box.

Address Purpose

Purpose	Remove
No results found.	

Note

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

Supplier Administration: Profile Management: Address Book >

Create Address

Supplier Name: GLOBAL KNOWLEDGE NETWORK (CANADA) INC. Supplier Number: 008159

Country: Canada
Address Name: TRADE BUILDING
Address Line 1: 506 PACIFIC STREET
Address Line 2:
Address Line 3:
Address Line 4:
City:
County:
State: VANCOUVER
Province: ON
Postal Code:

Phone Area Code:
Phone Number:
Fax Area Code:
Fax Number:
Email Address:

Purchasing Address
 Payment Address
 RFQ Only Address

Select the **Payment Address** check box.

Address Purpose

Purpose	Remove
No results found.	

Note

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.

Supplier Administration: Profile Management: Address Book >

Create Address

Cancel Save

* Indicates required field

Supplier Name GLOBAL KNOWLEDGE NETWORK (CANADA) INC. Supplier Number 008159

Country Canada

* Address Name TRADE BUILDING

* Address Line 1 506 PACIFIC STREET

Address Line 2

Address Line 3

Address Line 4

City

County

State VANCOUVER

Province ON

Postal Code

Phone Area Code

Phone Number

Fax Area Code

Fax Number

Email Address

Purchasing Address

Payment Address

RFQ Only Address


Address Purpose

Purpose	Rem
No results found.	

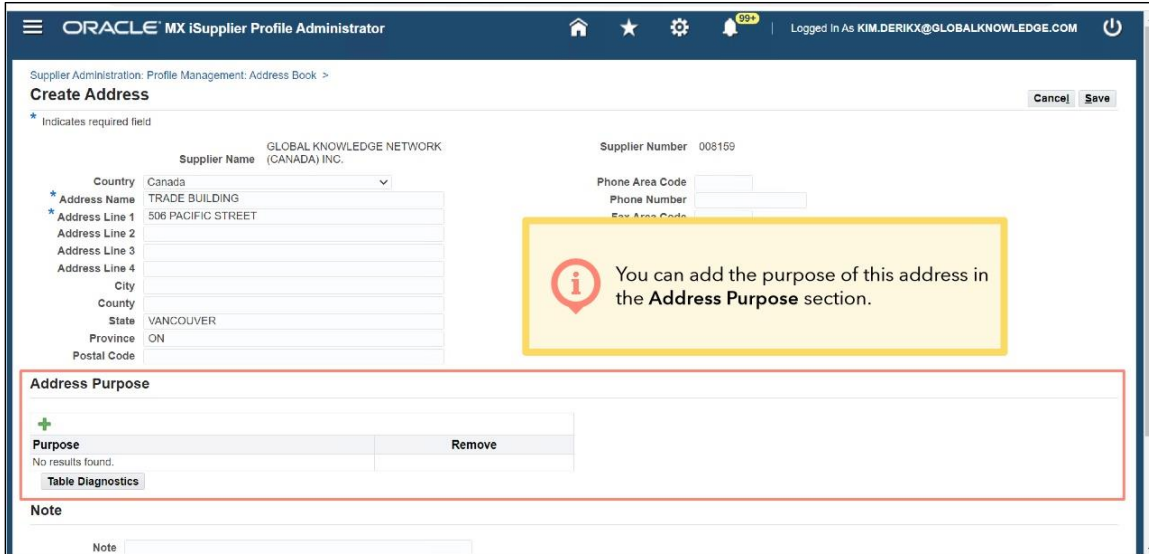
Table Diagnostics

Note

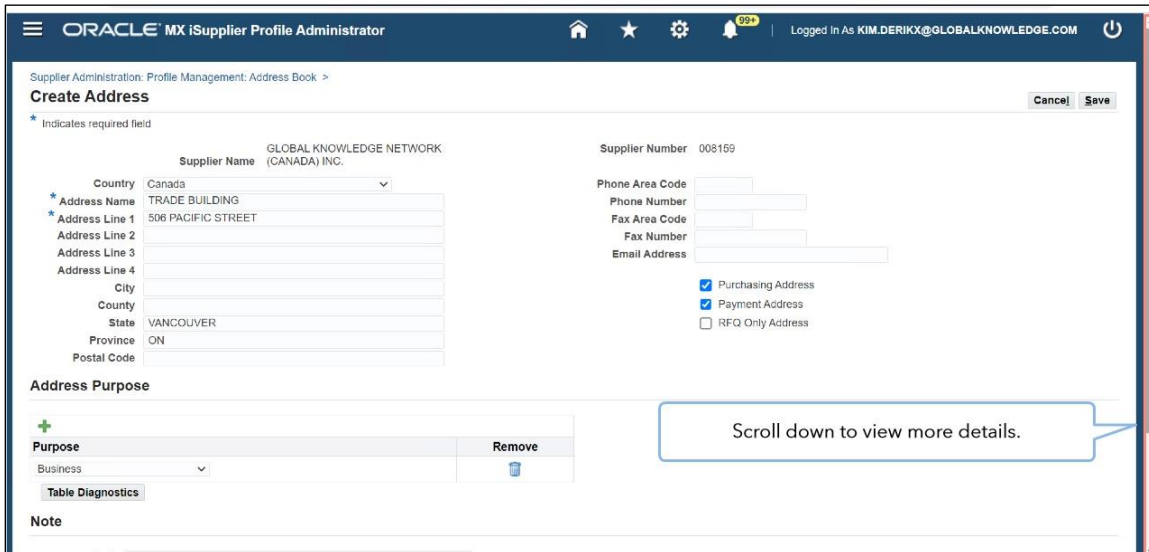
Note

 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.

The screenshot shows a web form for managing an address. The form includes fields for Country (Canada), Address Name (TRADE BUILDING), Address Line 1 (506 PACIFIC STREET), City, State (VANCOUVER), Province (ON), and Postal Code. There are also fields for Phone Area Code, Phone Number, Fax Area Code, Fax Number, and Email Address. Checkboxes are present for Purchasing Address, Payment Address, and RFQ Only Address. A yellow callout box with an information icon contains the text: "You can add any additional notes related to the address in the Note section." Below the form is a "Note" section with a text area and a "Diagnostic Console" button. At the bottom, there are "Cancel" and "Save" buttons.

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

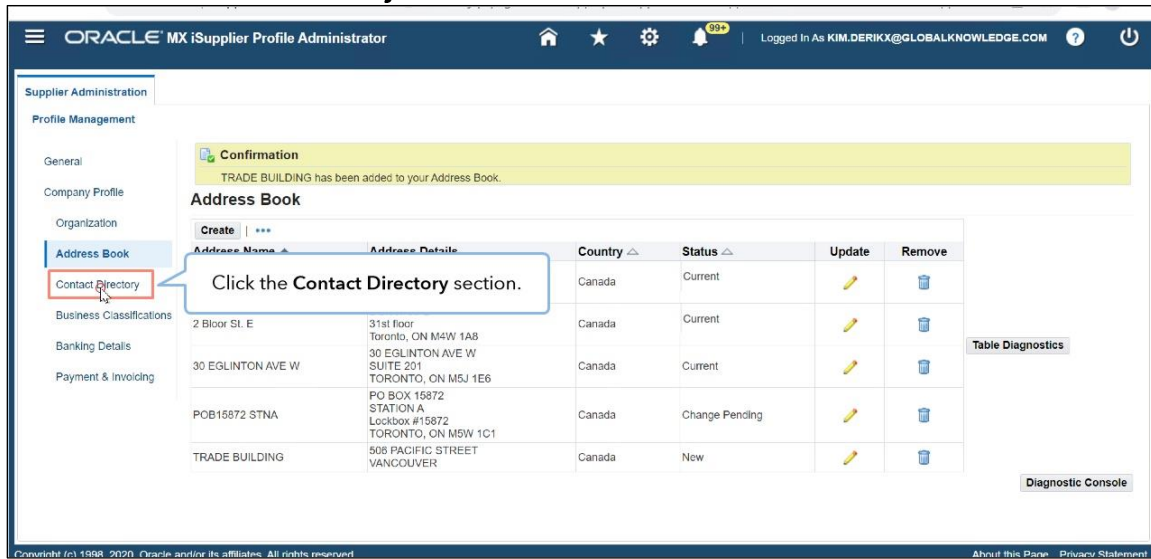
This screenshot is similar to the one above but shows the form with a populated note. The yellow callout box now contains the text: "In this demonstration, the relevant fields are populated for you." The "Note" section contains the text: "A new address has been added for Purchasing and Payment address." The "Diagnostic Console" button is visible at the bottom right of the note section.

27. Click the **Save** link.

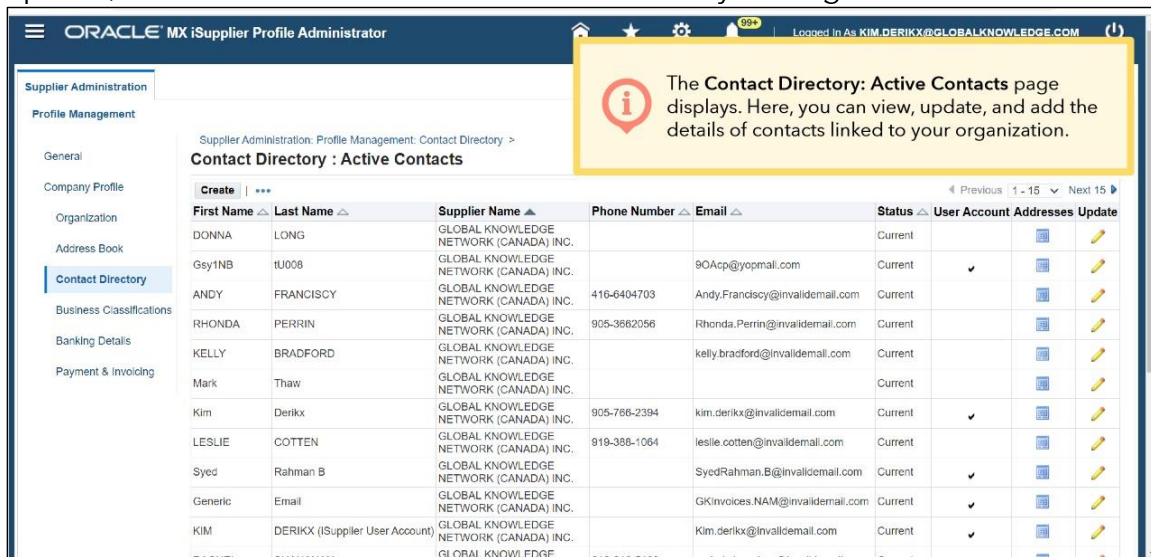
A message displays, confirming that the address has been added to your **Address Book**. Metrolinx will receive a notification to review the new address. Once the new address is approved, you can use it as a payment and/or purchasing address, as per your selection.

Address Name	Address Line 1	Address Line 2	Address Line 3	Address Line 4	City	Country	Status	Actions
POB15872 STNA	TORONTO, ON M5J 1E6	PO BOX 15872	STATION A	Lockbox #15872	TORONTO, ON M5W 1C1	Canada	Change Pending	[Edit] [Delete]
TRADE BUILDING	506 PACIFIC STREET				VANCOUVER	Canada	New	[Edit] [Delete]

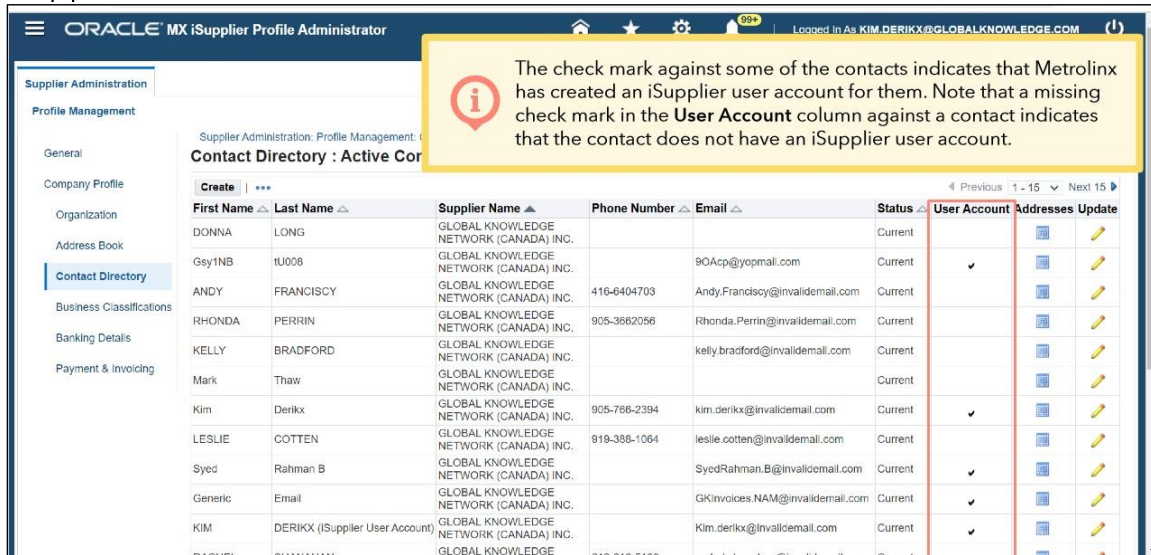
28. Click the **Contact Directory** section.



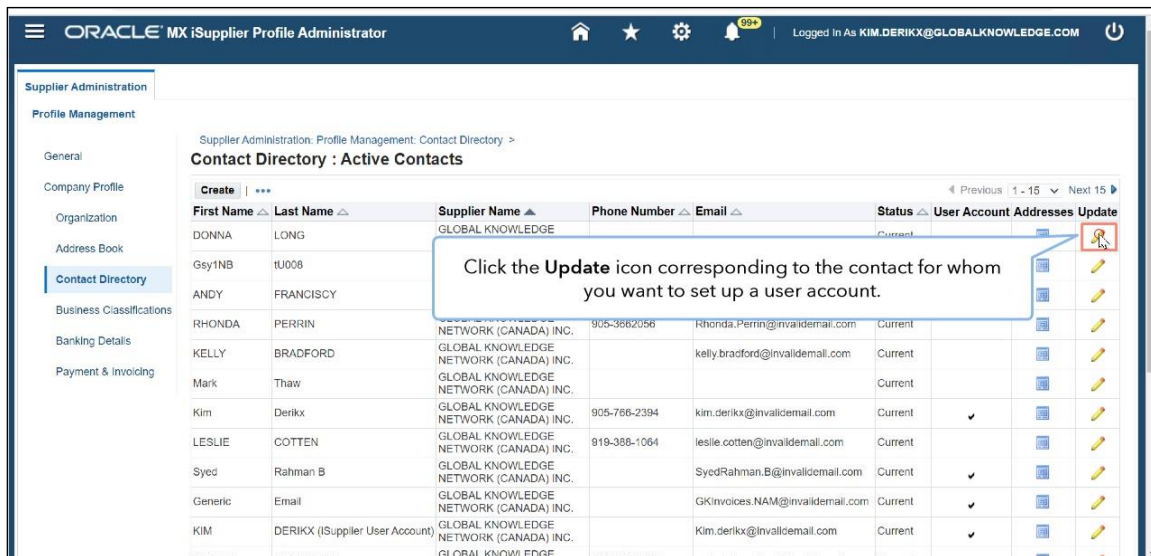
The **Contact Directory: Active Contacts** page displays. Here, you can view, update, and add the details of contacts linked to your organization.



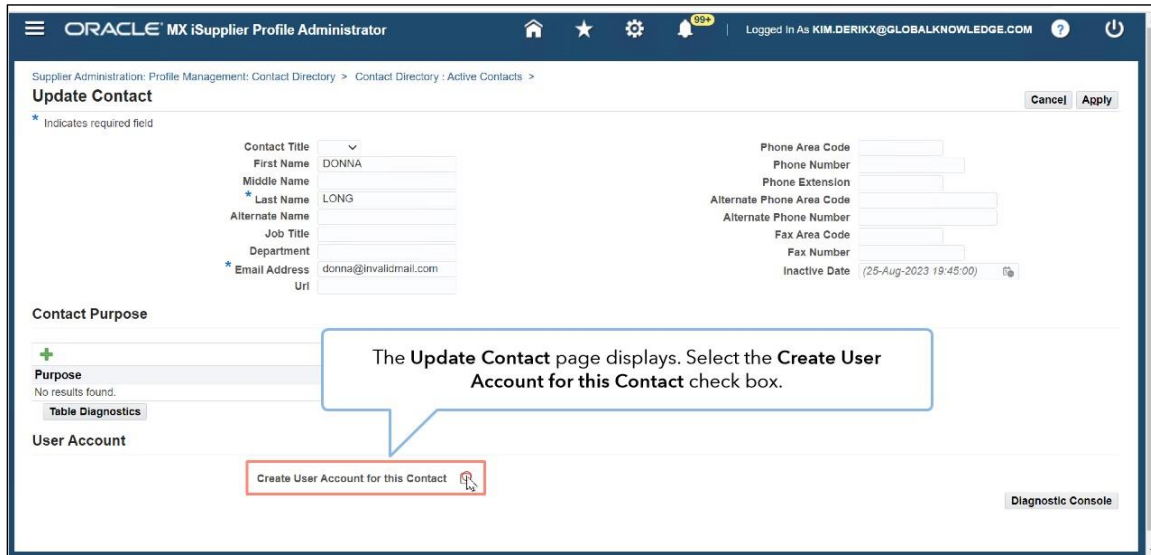
The check mark against some of the contacts indicates that Metrolinx has created an iSupplier user account for them. Note that a missing check mark in the **User Account** column against a contact indicates that the contact does not have an iSupplier user account.



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

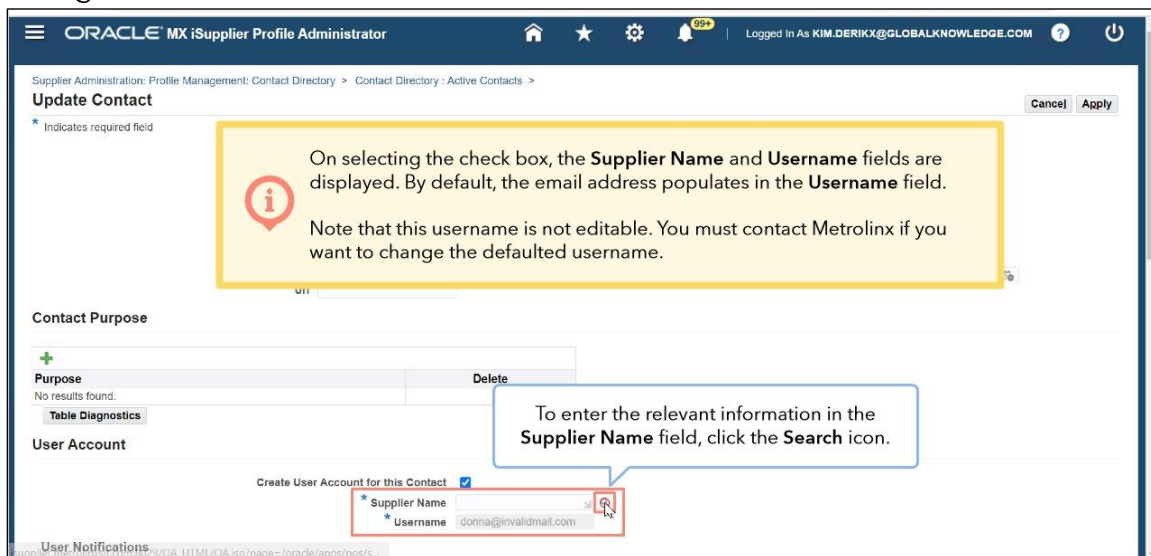


30. The **Update Contact** page displays. Select the **Create User Account** for this **Contact** check box.

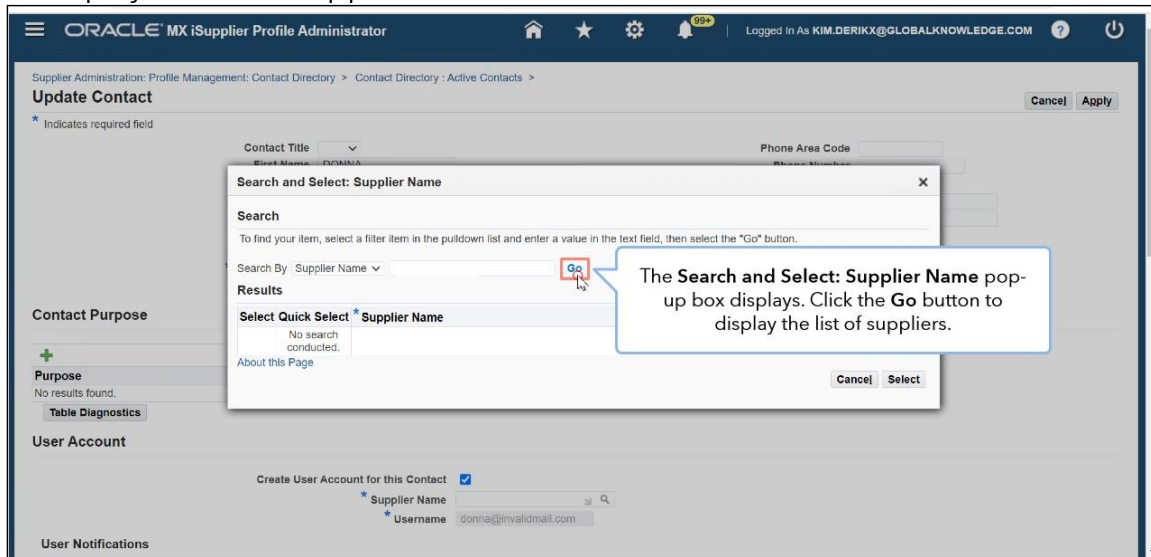


On selecting the check box, the **Supplier Name** and **Username** fields are displayed. By default, the email address populates in the **Username** field.

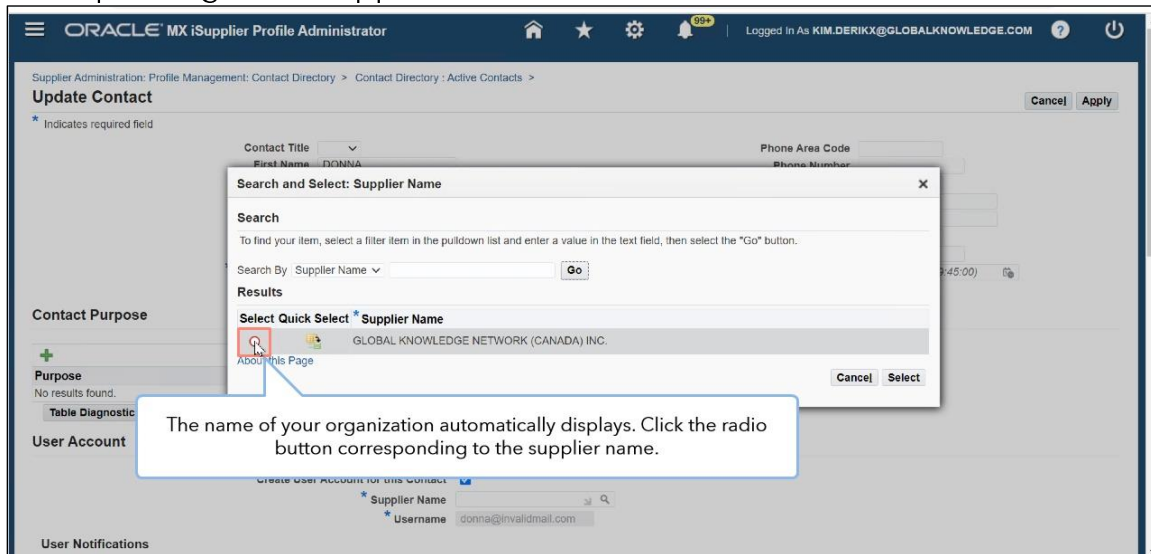
Note: This username is not editable. You must contact Metrolinx if you want to change the defaulted username.



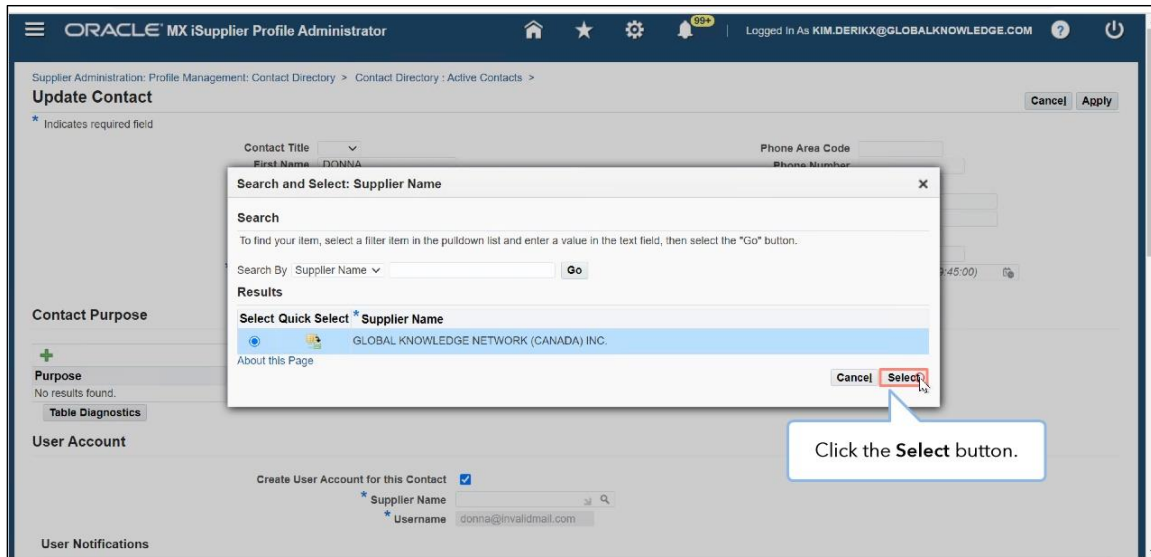
31. The **Search and Select: Supplier Name** pop-up box displays. Click the **Go** button to display the list of suppliers.



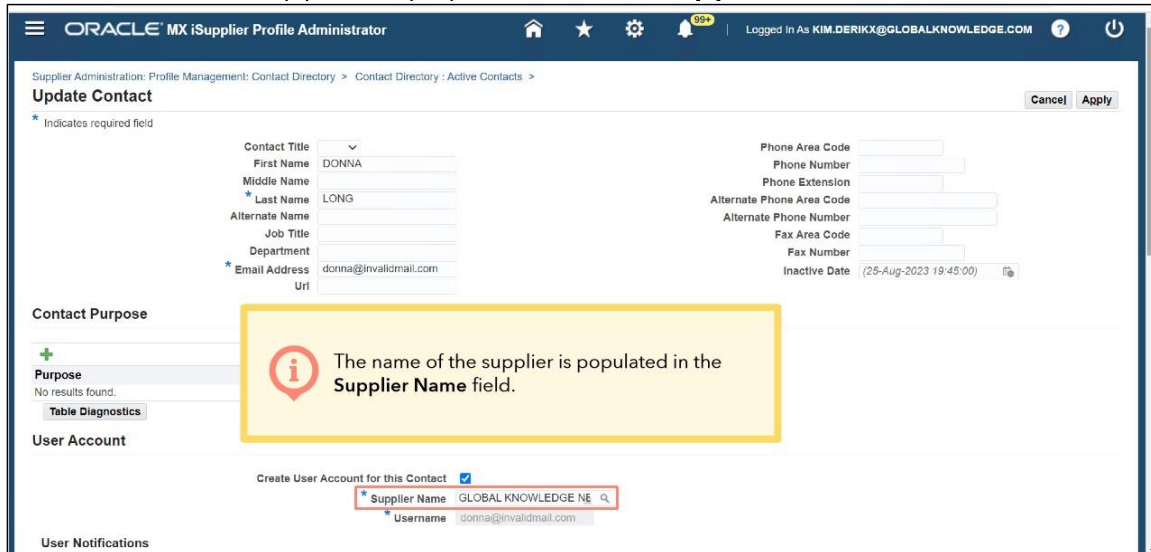
32. The name of your organization automatically displays. Click the radio button corresponding to the supplier name.



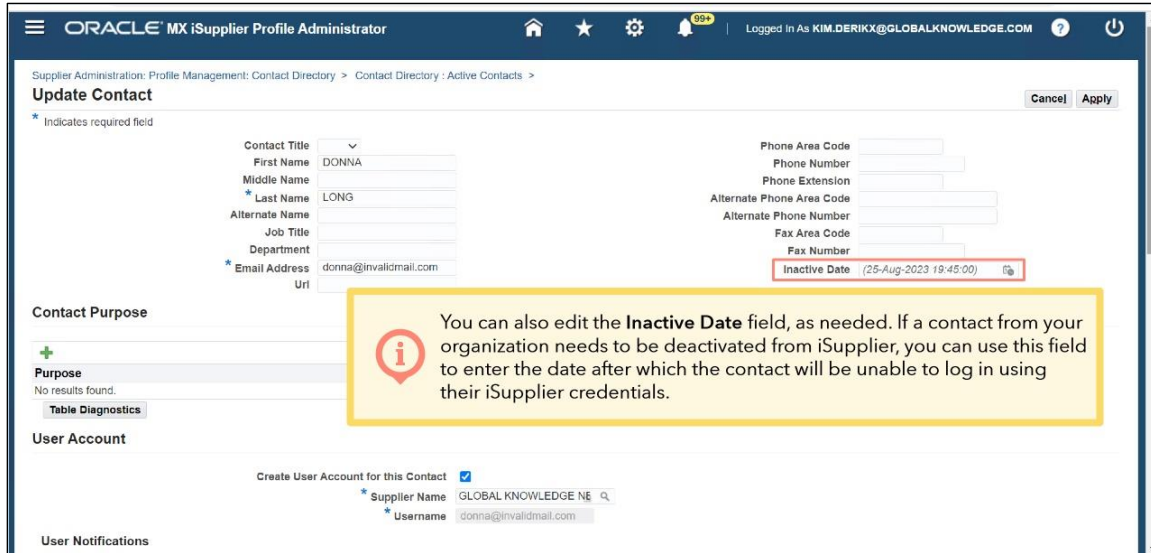
33. Click the **Select** button.



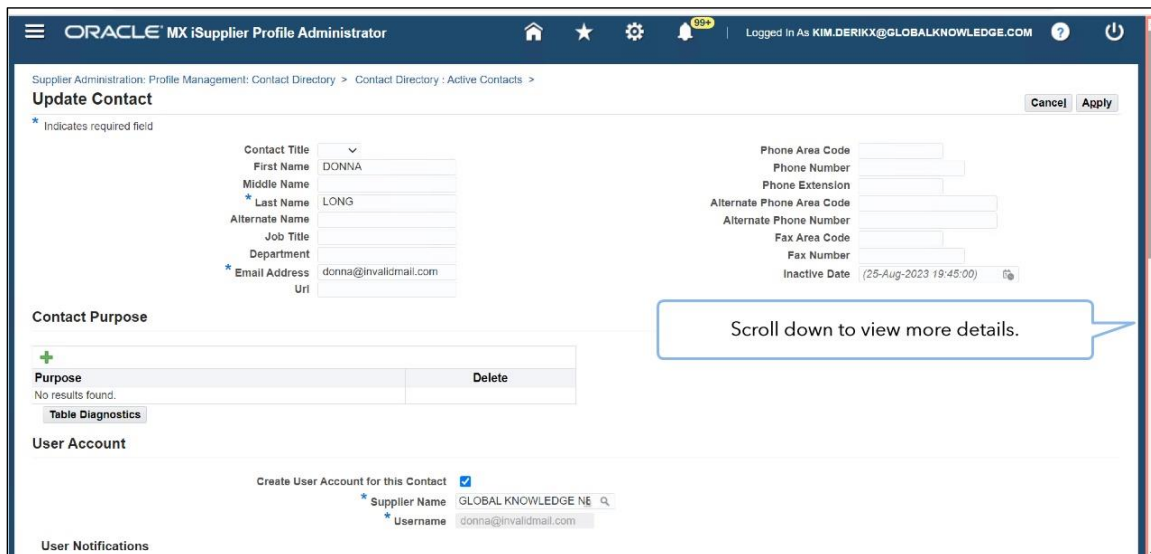
34. The name of the supplier is populated in the **Supplier Name** field.



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.

Responsibilities

Responsibility	Application
<input type="checkbox"/> MX iSupplier Portal Supplier PO Inv Admin	iSupplier Portal
<input type="checkbox"/> MX iSupplier Broker	iSupplier Portal
<input type="checkbox"/> MX iSupplier Portal Supplier Inv Admin	iSupplier Portal
<input checked="" type="checkbox"/> MX iSupplier Profile Administrator	iSupplier Portal

Table Diagnostics

The **Responsibilities** section displays the list of roles assigned to the contact.

- **MX iSupplier Portal Supplier PO Inv Admin:** This option enables the selected contact to submit only PO-based invoices.
- **MX iSupplier Broker:** This option enables the selected contact to submit non-PO invoices.
- **MX iSupplier Portal Supplier Inv Admin:** This option enables the selected contact to submit PO-based as well as non-PO invoices.
- **MX iSupplier Profile Administrator:** This option enables the selected contact to update the vendor details in the system and add or deactivate other contacts from the iSupplier Contact Directory.

You can also change the roles assigned, if required.

Access not restricted by Supplier Contact.

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.

Responsibilities

Responsibility	Application
<input type="checkbox"/> MX iSupplier Portal Supplier PO Inv Admin	iSupplier Portal
<input type="checkbox"/> MX iSupplier Broker	iSupplier Portal
<input type="checkbox"/> MX iSupplier Portal Supplier Inv Admin	iSupplier Portal
<input checked="" type="checkbox"/> MX iSupplier Profile Administrator	iSupplier Portal

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.

Table Diagnostics

Site Restriction

Modify Sites

Supplier	Site	Operating Unit
<small>Access not restricted by Supplier Site.</small>		

Table Diagnostics

Contact Restriction

Modify Contacts

Supplier	Contact	Address
<small>Access not restricted by Supplier Contact.</small>		

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

Responsibilities

Responsibility	Application
<input type="checkbox"/> MX iSupplier Portal Supplier PO Inv Admin	iSupplier Portal
<input type="checkbox"/> MX iSupplier Broker	iSupplier Portal
<input type="checkbox"/> MX iSupplier Portal Supplier Inv Admin	iSupplier Portal
<input checked="" type="checkbox"/> MX iSupplier Profile Administrator	iSupplier Portal

User Access Restrictions

If no Supplier Sites or Contacts are specified, the user will be able to access all the data for this supplier.

Supplier Restriction

Suppliers

GLOBAL KNOWLEDGE NETWORK (CANADA) INC.

Table Diagnostics

Site Restriction

Modify Sites

Supplier

Access not restricted by Supplier site.

Table Diagnostics

Contact Restriction

Modify Contacts

Supplier	Contact	Address
Access not restricted by Supplier Contact.		

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

ORACLE iSupplier Profile Administrator

Supplier Administration: Profile Management: Contact Directory > Update Contact >

Modify Site Restrictions Apply Cancel

Search

Search Supplier Sites for Access Restrictions

Supplier Name

Site

Operating Unit

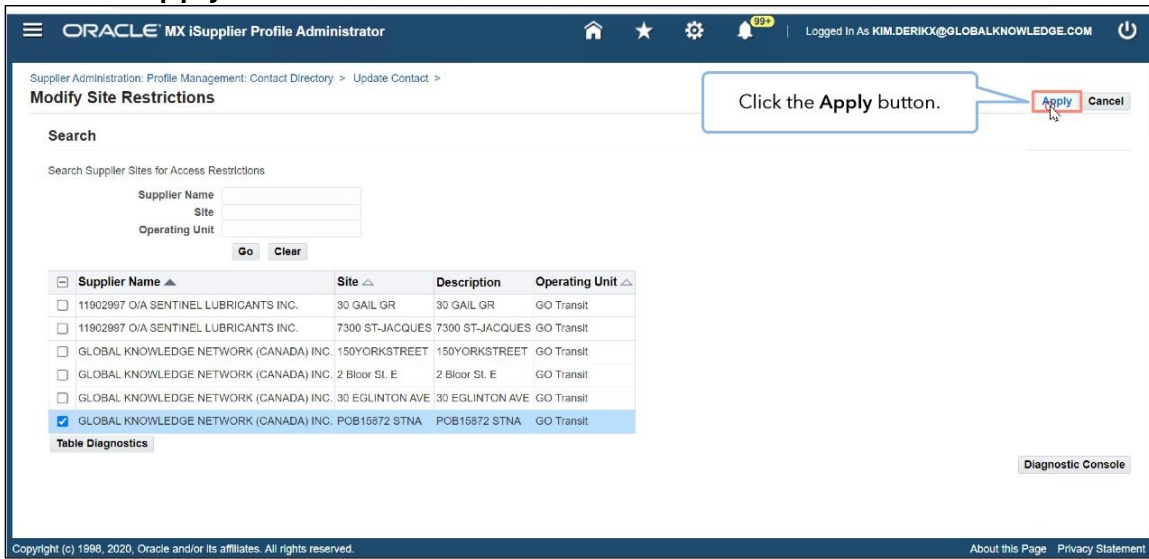
Go Clear

Supplier Name	Site	Description	Operating Unit
<input type="checkbox"/> 11902997 OIA SENTINEL LUBRICANTS INC.	30 GAIL GR	30 GAIL GR	GO Transit
<input type="checkbox"/> 11902997 OIA SENTINEL LUBRICANTS INC.	7300 ST-JACQUES	7300 ST-JACQUES	GO Transit
<input type="checkbox"/> GLOBAL KNOWLEDGE NETWORK (CANADA) INC.	150YORKSTREET	150YORKSTREET	GO Transit
<input type="checkbox"/> GLOBAL KNOWLEDGE NETWORK (CANADA) INC.	2 Bloor St. E	2 Bloor St. E	GO Transit
<input type="checkbox"/> GLOBAL KNOWLEDGE NETWORK (CANADA) INC.	30 EGLINTON AVE	30 EGLINTON AVE	GO Transit
<input checked="" type="checkbox"/> GLOBAL KNOWLEDGE NETWORK (CANADA) INC.	150YORKSTREET	150YORKSTREET	GO Transit

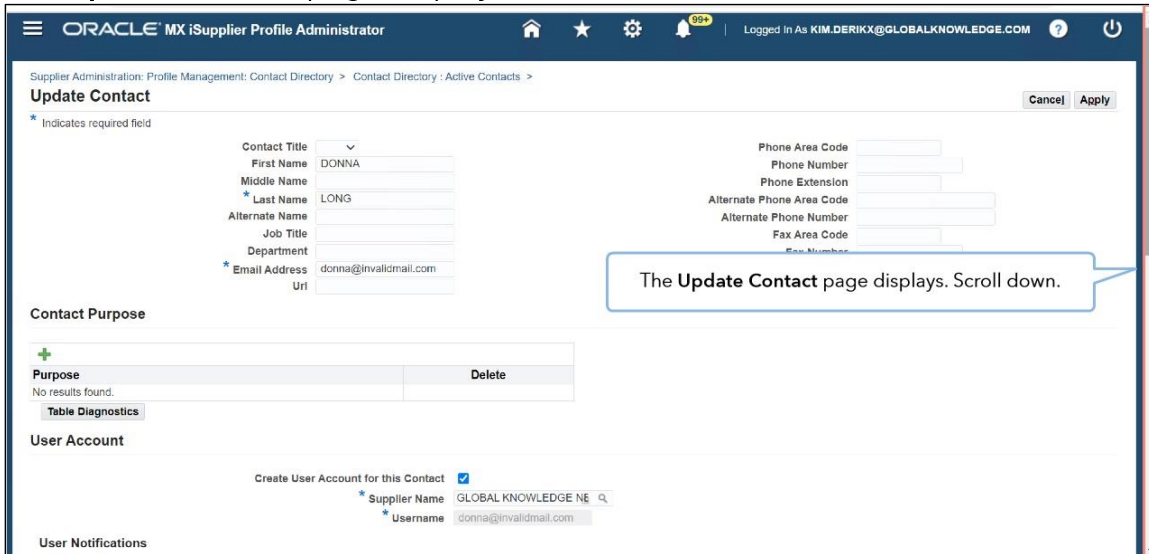
Table Diagnostics Diagnostic Console

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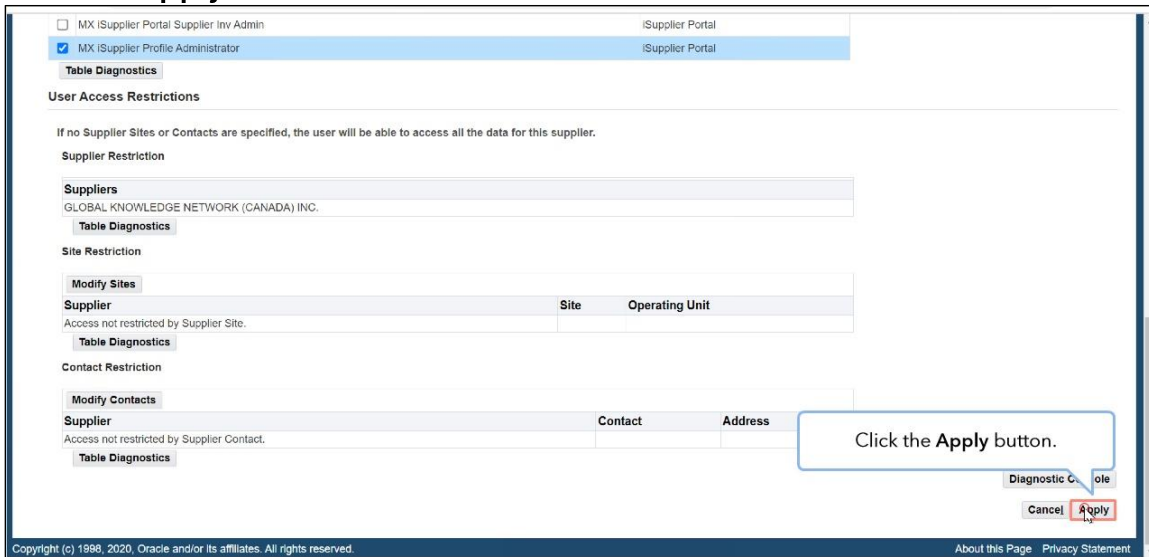
38. Click the **Apply** button.



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

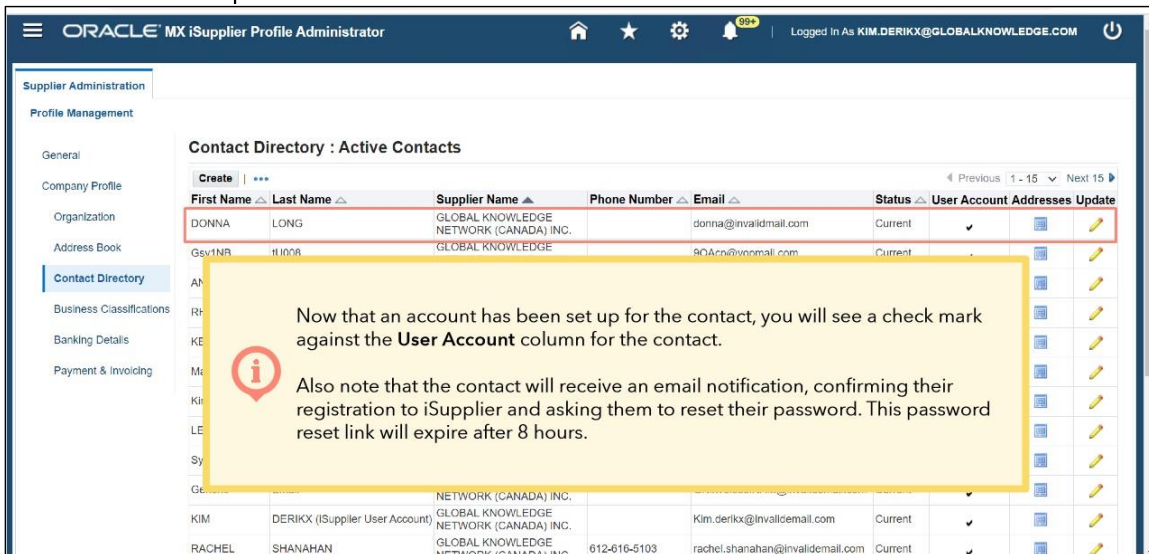


40. Click the **Apply** button.

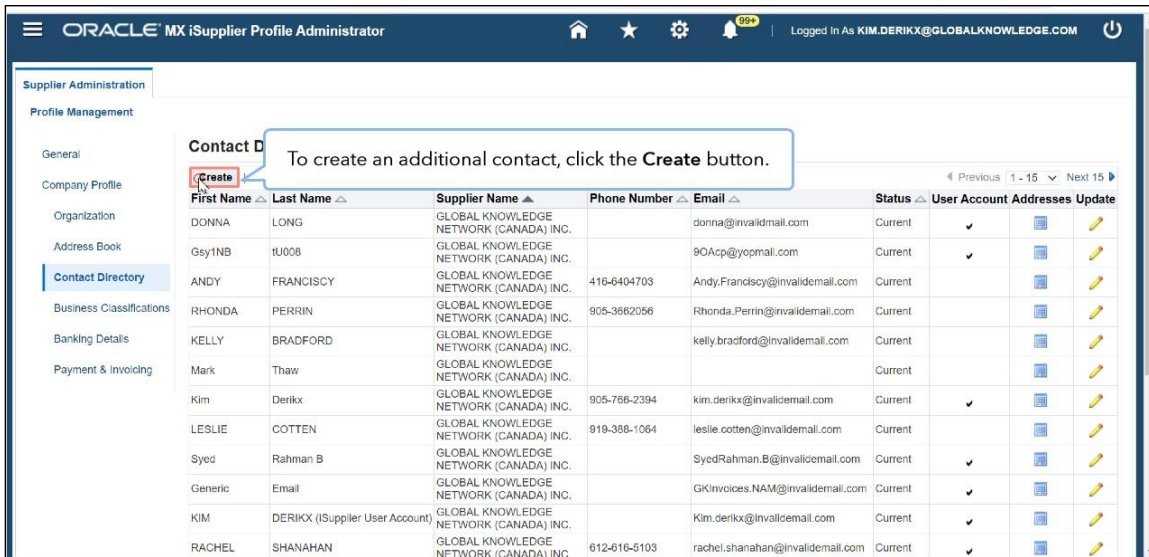


Now that an account has been set up for the contact, you will see a check mark against the User Account column for the contact.

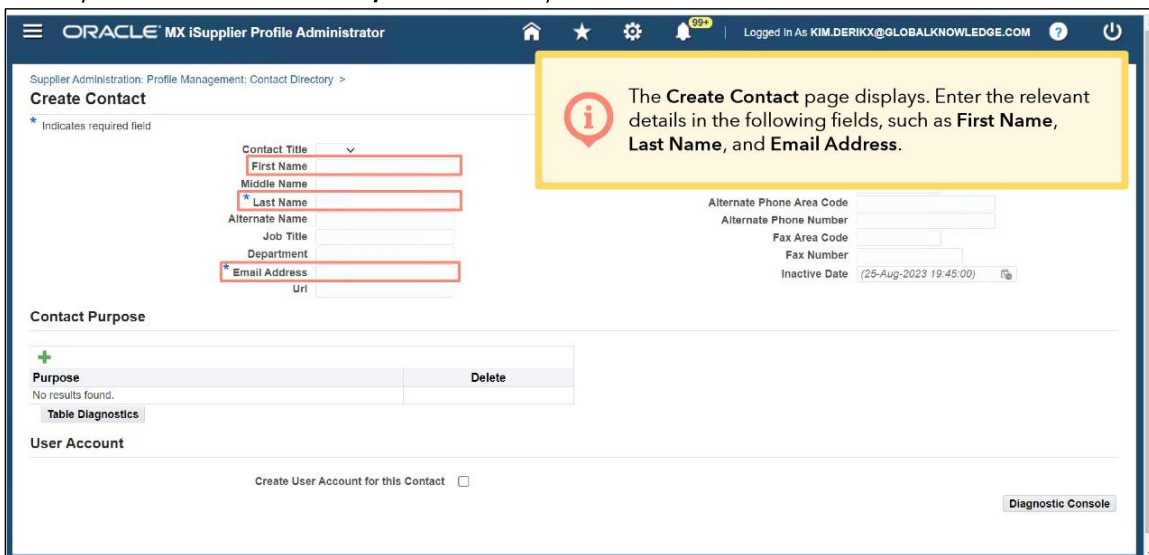
Also note that the contact will receive an email notification, confirming their registration to iSupplier and asking them to reset their password. This password reset link will expire after 8 hours.



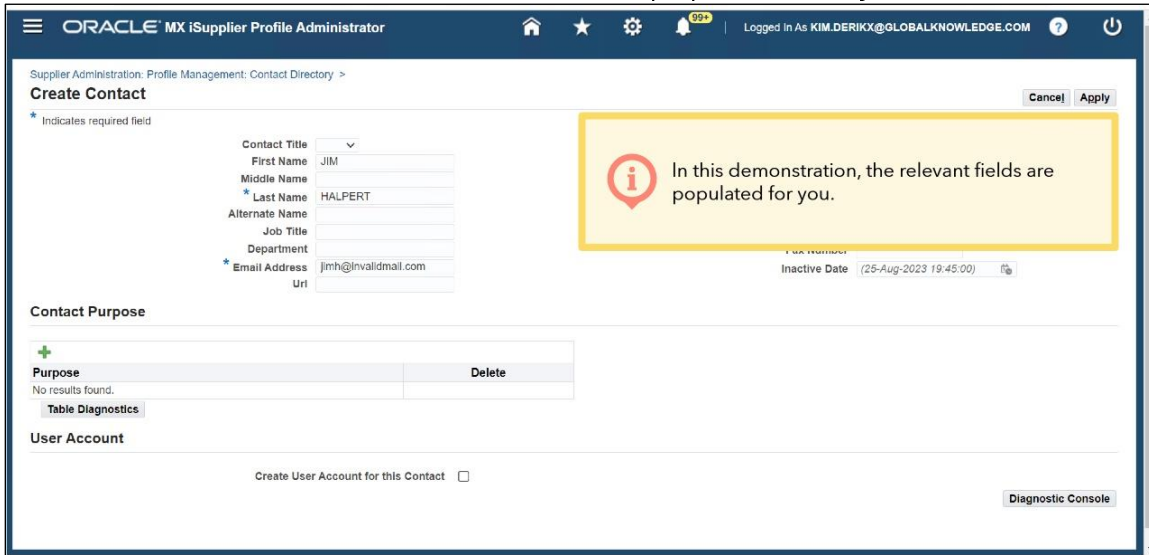
41. To create an additional contact, click the **Create** button.



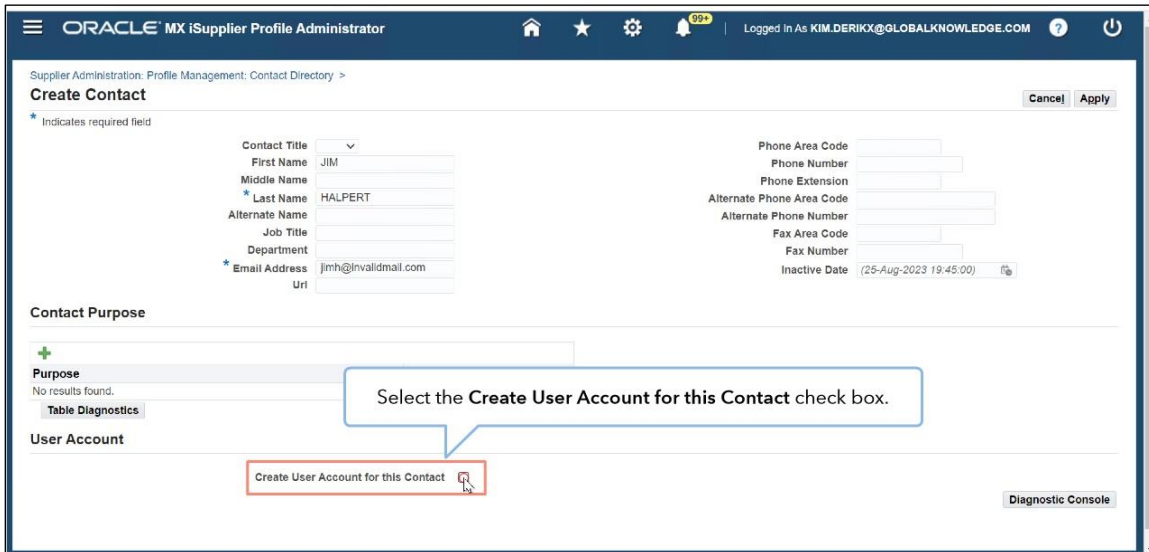
The **Create Contact** page displays. Enter the relevant details in the following fields, such as **First Name**, **Last Name**, and **Email Address**.



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

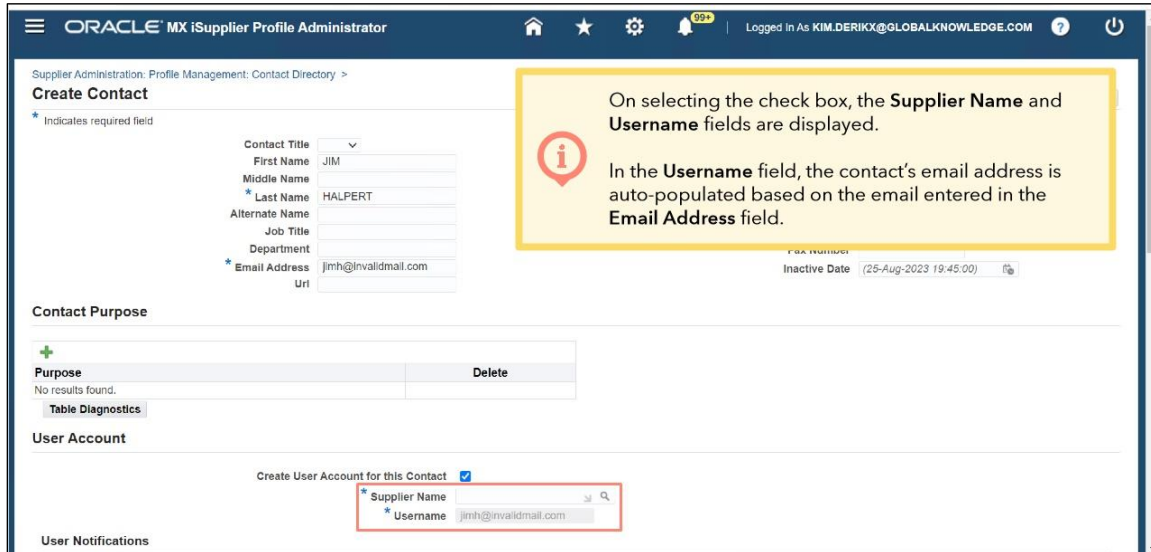


42. Select the **Create User Account for this Contact** check box.

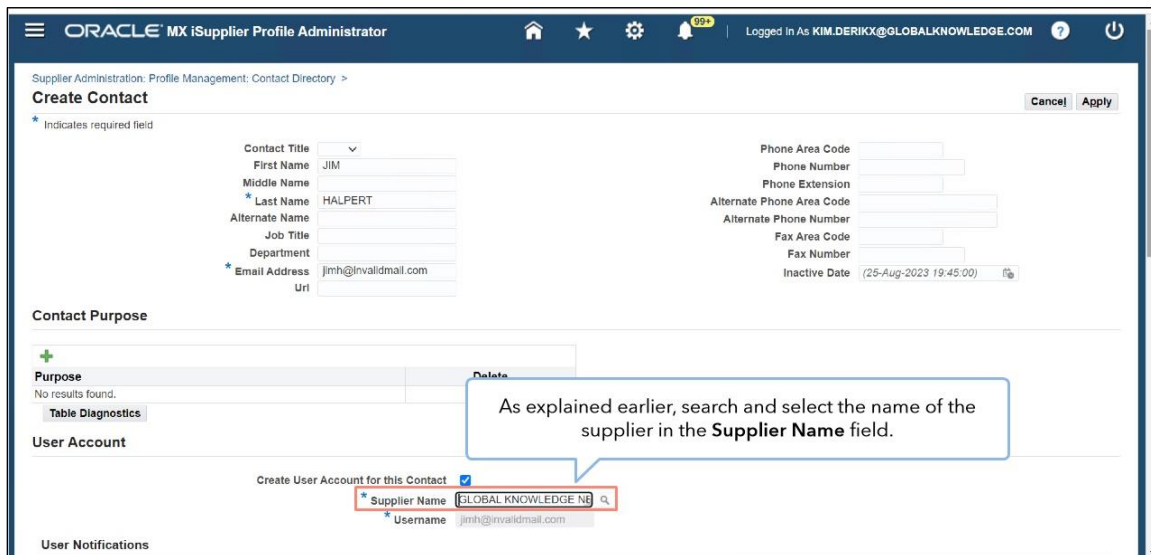


On selecting the check box, the **Supplier Name** and **Username** fields are displayed.

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

Supplier Administration: Profile Management: Contact Directory >

Create Contact

Cancel Apply

* Indicates required field

Contact Title

First Name

Middle Name

* Last Name

Alternate Name

Job Title

Department

* Email Address

Uri

Phone Area Code

Phone Number

Phone Extension

Alternate Phone Area Code

Alternate Phone Number

Fax Area Code

Scroll down to view more details.

Contact Purpose

+ Purpose Delete

No results found.

Table Diagnostics

User Account

Create User Account for this Contact

* Supplier Name

* Username

User Notifications

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

MX iSupplier Portal Supplier Inv Admin :Supplier Portal

MX iSupplier Profile Administrator :Supplier Portal

Table Diagnostics

User Access

If no Supplier

Supplier Re:

Suppliers GLOBAL KN

Table Diagnostics

Site Restriction

Modify Sites

Supplier	Site	Operating Unit
Access not restricted by Supplier Site.		

Table Diagnostics

Contact Restriction

Modify Contacts

Supplier	Contact	Address
Access not restricted by Supplier Contact.		

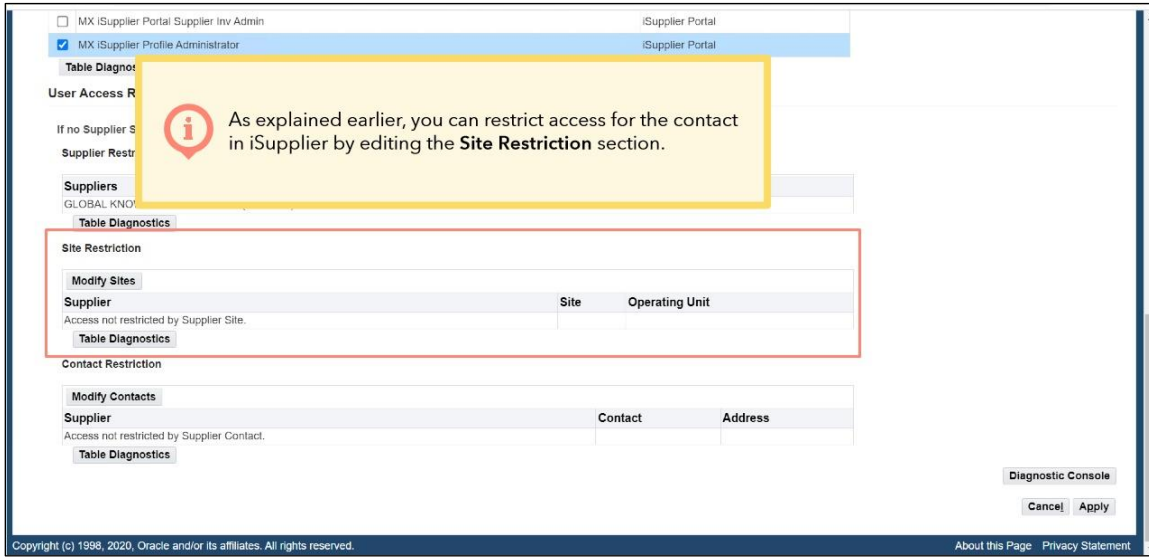
Table Diagnostics

Diagnostic Console

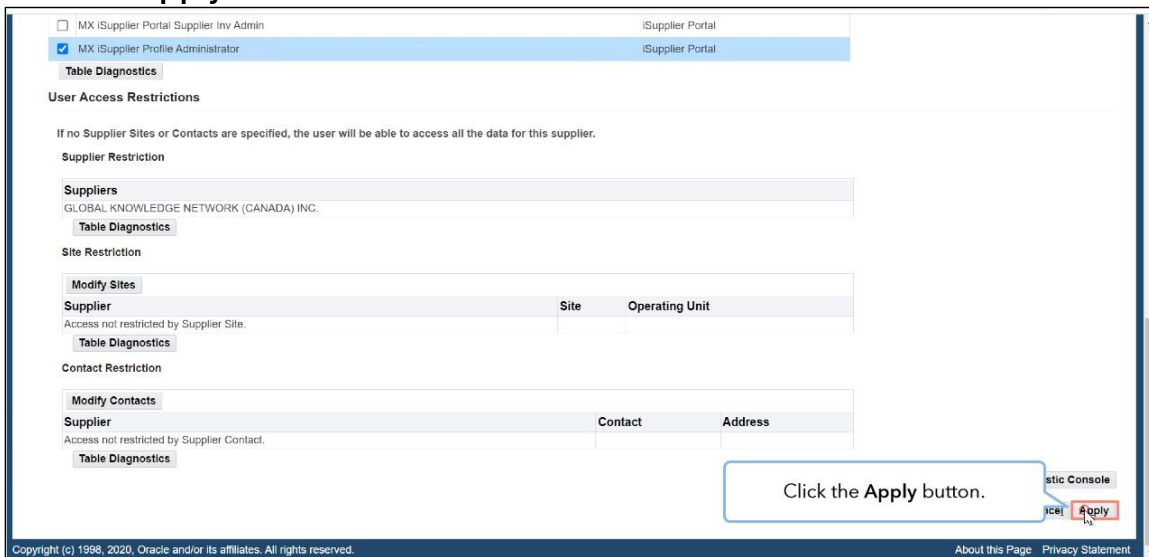
Cancel Apply

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

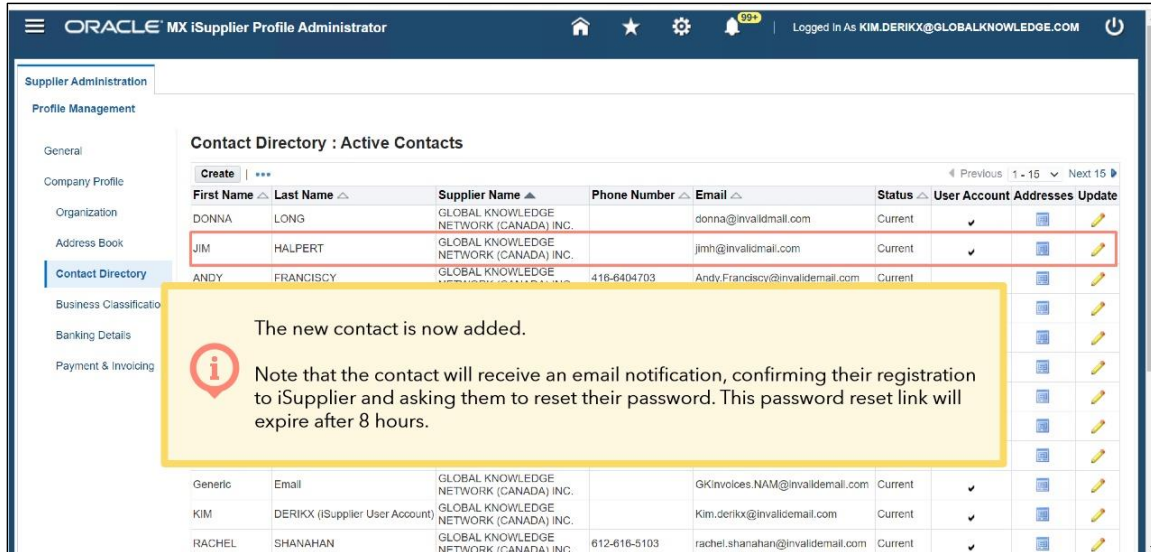


45. Click the **Apply** button.

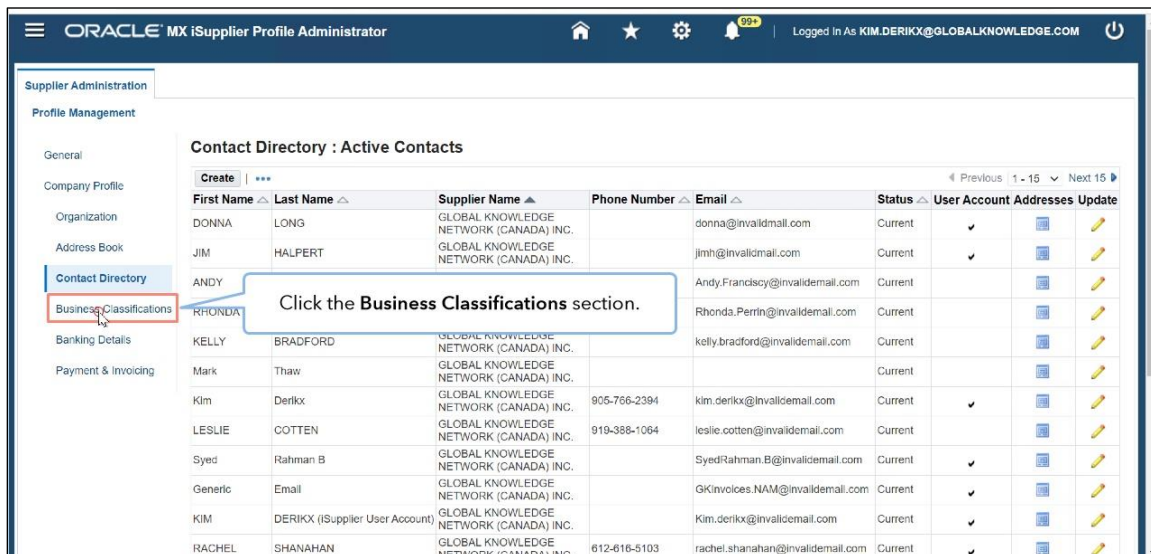


The new contact is now added.

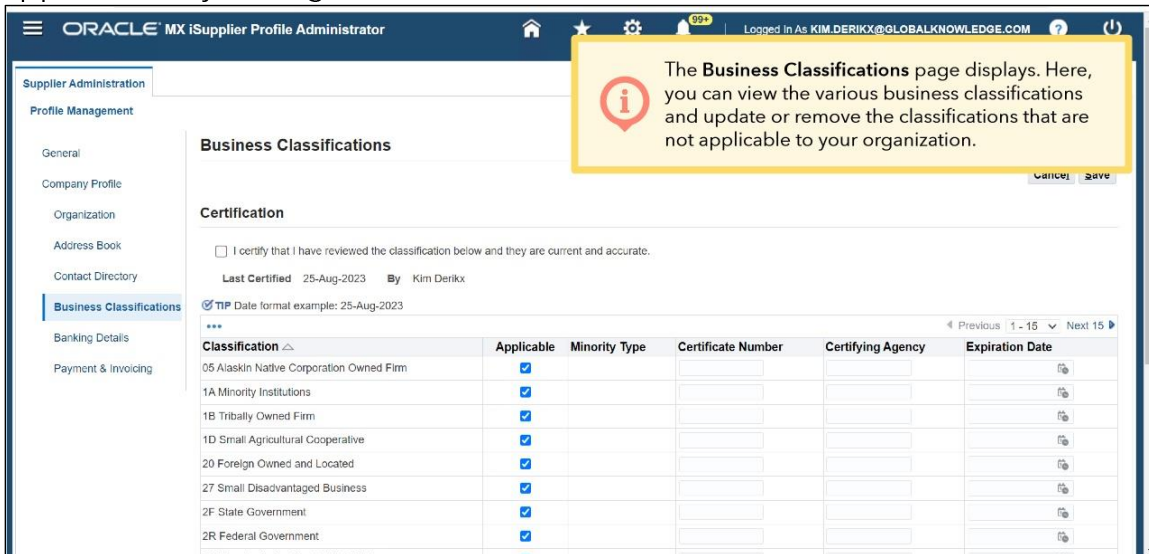
Note that the contact will receive an email notification, confirming their registration to iSupplier and asking them to reset their password. This password reset link will expire after 8 hours.



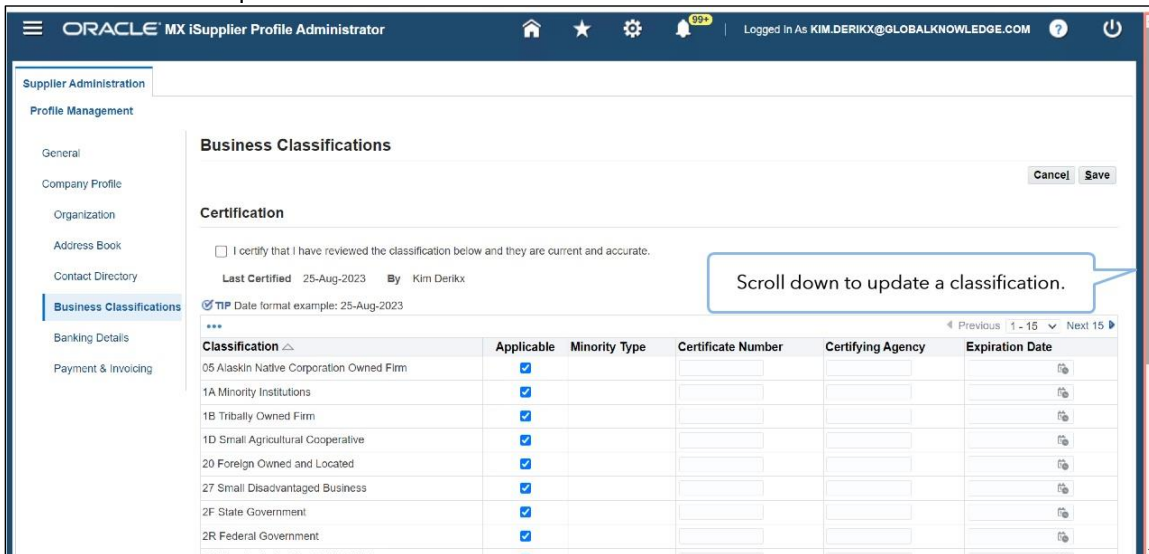
46. Click the **Business Classifications** section.



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.

The screenshot shows a table with the following columns: Classification, Applicable, Minority Type, Certificate Number, Certifying Agency, and Expiration Date. The 'Applicable' column contains checkboxes for each classification. A callout box points to the checkbox for '12 Local Government', which is currently unchecked.

Classification	Applicable	Minority Type	Certificate Number	Certifying Agency	Expiration Date
05 Alaskan Native Corporation Owned Firm	<input checked="" type="checkbox"/>				
1A Minority Institutions	<input checked="" type="checkbox"/>				
1B Tribally Owned Firm	<input checked="" type="checkbox"/>				
1D Small Agricultural Cooperative	<input checked="" type="checkbox"/>				
20 Foreign Owned and Located	<input checked="" type="checkbox"/>				
27 Small Disadvantaged Business	<input checked="" type="checkbox"/>				
2F State Government	<input checked="" type="checkbox"/>				
2R Federal Government	<input checked="" type="checkbox"/>				
8B Housing Authorities Public/Tribal	<input checked="" type="checkbox"/>				
Women Owned	<input checked="" type="checkbox"/>				
XY Indian Tribe (Federally Recognized)	<input checked="" type="checkbox"/>				
ZR Inter- municipal	<input checked="" type="checkbox"/>				
ZW School of Forestry	<input checked="" type="checkbox"/>				
12 Local Government	<input type="checkbox"/>				
2U Other Not for Profit Organization	<input type="checkbox"/>				

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

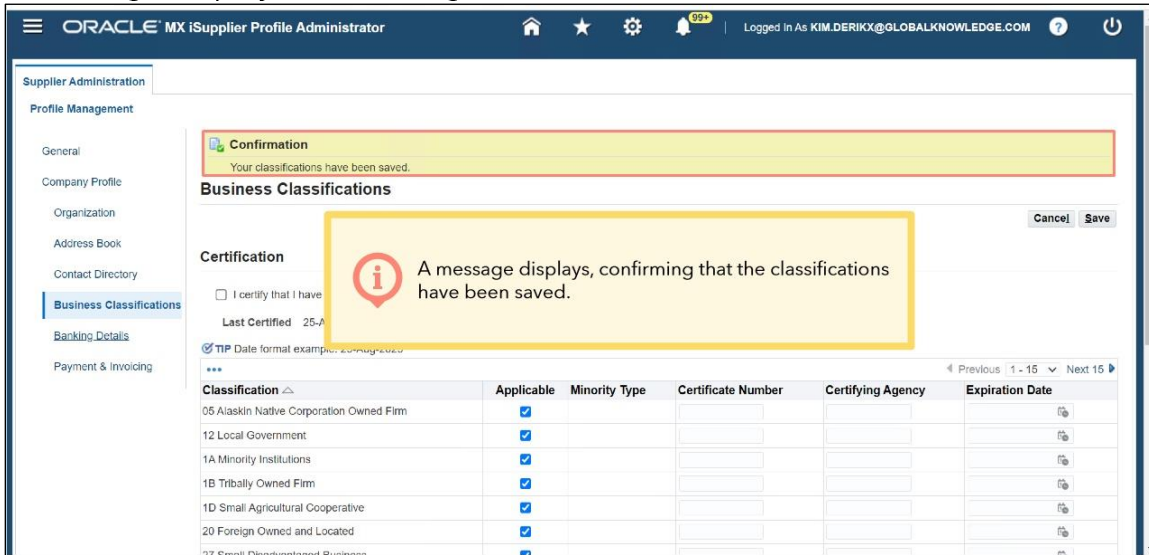
49. Click the **Save** button.

The screenshot shows the same table as in the previous step, but now the 'Applicable' checkbox for '12 Local Government' is checked. A callout box points to the 'Save' button in the bottom right corner of the table.

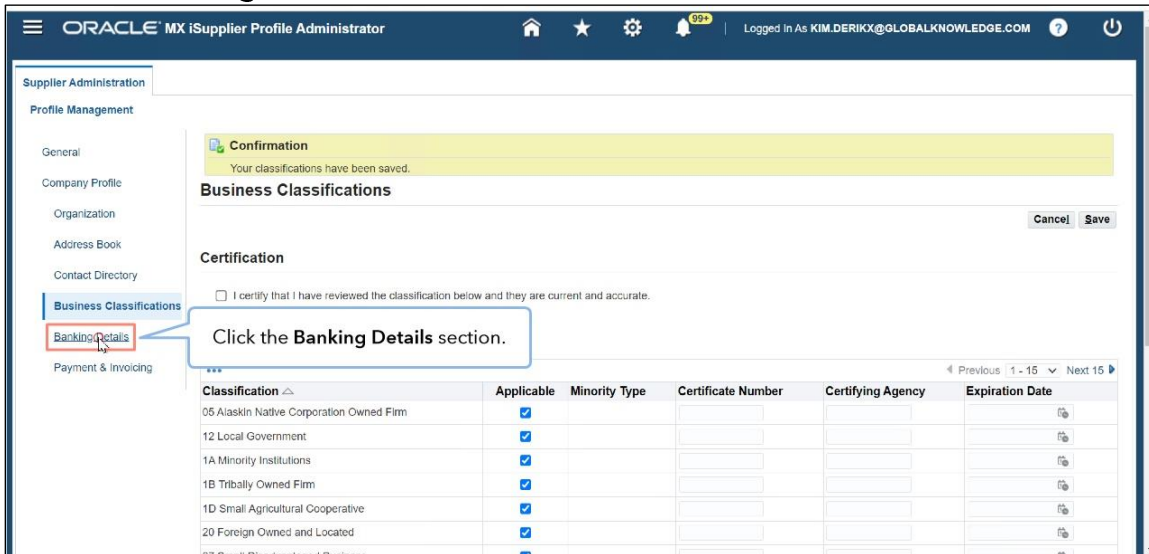
Classification	Applicable	Minority Type	Certificate Number	Certifying Agency	Expiration Date
05 Alaskan Native Corporation Owned Firm	<input checked="" type="checkbox"/>				
1A Minority Institutions	<input checked="" type="checkbox"/>				
1B Tribally Owned Firm	<input checked="" type="checkbox"/>				
1D Small Agricultural Cooperative	<input checked="" type="checkbox"/>				
20 Foreign Owned and Located	<input checked="" type="checkbox"/>				
27 Small Disadvantaged Business	<input checked="" type="checkbox"/>				
2F State Government	<input checked="" type="checkbox"/>				
2R Federal Government	<input checked="" type="checkbox"/>				
8B Housing Authorities Public/Tribal	<input checked="" type="checkbox"/>				
Women Owned	<input checked="" type="checkbox"/>				
XY Indian Tribe (Federally Recognized)	<input checked="" type="checkbox"/>				
ZR Inter- municipal	<input checked="" type="checkbox"/>				
ZW School of Forestry	<input checked="" type="checkbox"/>				
12 Local Government	<input checked="" type="checkbox"/>				
2U Other Not for Profit Organization	<input type="checkbox"/>				

Callout text: Click the **Save** button.

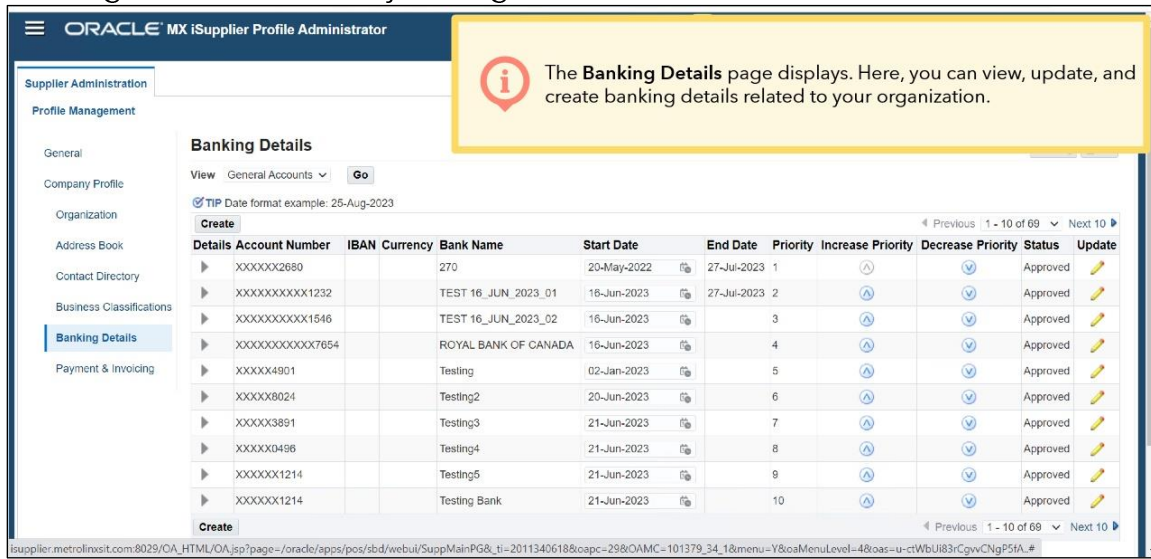
A message displays, confirming that the classifications have been saved.



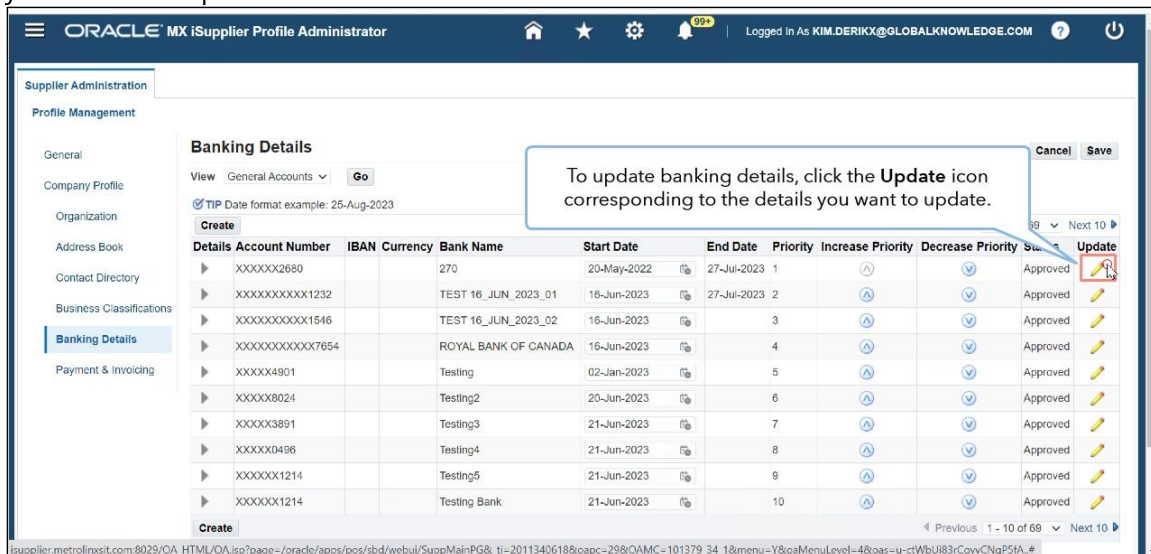
50. Click the **Banking Details** section.



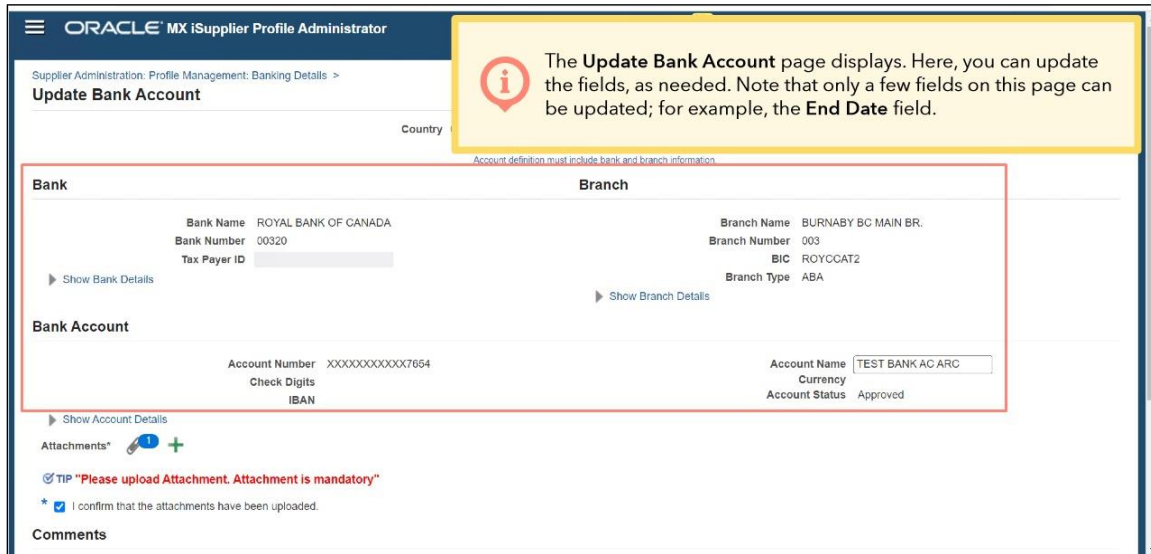
The **Banking Details** page displays. Here, you can view, update, and create banking details related to your organization.



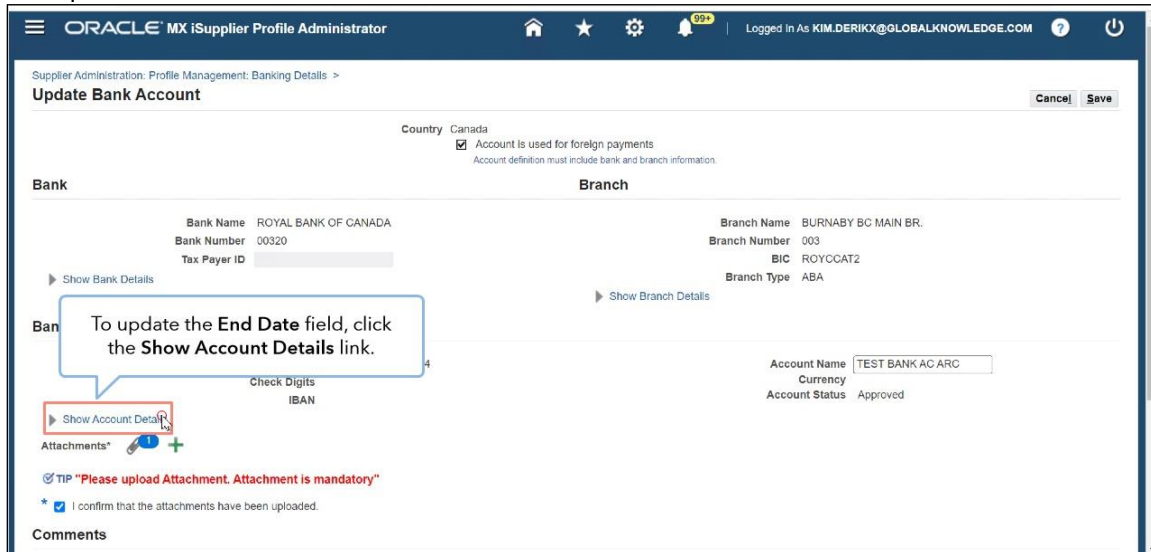
51. To update banking details, click the **Update** icon corresponding to the details you want to update.



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.

Bank Name: ROYAL BANK OF CANADA
Bank Number: 00320
Tax Payer ID: [Redacted]

Branch Name: BURKABY BIC MAIN BR.
Branch Number: 003
BIC: ROYCCAT2
Branch Type: ABA

Account Name: TEST BANK AC ARC
Currency: [Redacted]
Account Status: Approved

The account details are displayed.

Hide Account Details

Details

Alternate Account Name: [Redacted]
Account Suffix: [Redacted]
Agency Location Code: [Redacted]

Account Type: [Redacted]
Description: [Redacted]
End Date: (25-Aug-2023)

Attachments* [1] +

TIP "Please upload Attachment. Attachment is mandatory"

I confirm that the attachments have been uploaded.

Comments

Note from Buyer: None
Note to Buyer: [Redacted]

Documents

supplier.metrolinx.com:8029/OA_HTML/OA.jsp?page=/oracle/apps/pos/sbd/webui/SuppMainPG&_ti=2011340618&CAMC=101379_34_1&menu=Y&oaMenuLevel=4&oaopc=30&oas=IN8Fz6QDu-J4GaexaXocw.#

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

Bank Name: ROYAL BANK OF CANADA
Bank Number: 00320
Tax Payer ID: [Redacted]

Branch Name: BURKABY BIC MAIN BR.
Branch Number: 003
BIC: ROYCCAT2
Branch Type: ABA

Account Number: XXXXXXXXXXXX7654
Check Digits: [Redacted]
IBAN: [Redacted]

Account Name: TEST BANK AC ARC
Currency: [Redacted]
Account Status: Approved

Hide Account Details

Details

Alternate Account Name: [Redacted]
Agency Location Code: [Redacted]

Account Type: [Redacted]
Description: [Redacted]
End Date: (25-Aug-2023)

Attachments* [1] +

TIP "Please upload Attachment. Attachment is mandatory"

I confirm that the attachments have been uploaded.

Comments

Note from Buyer: None
Note to Buyer: [Redacted]

Documents

supplier.metrolinx.com:8029/OA_HTML/OA.jsp?page=/oracle/apps/pos/sbd/webui/SuppMainPG&_ti=2011340618&CAMC=101379_34_1&menu=Y&oaMenuLevel=4&oaopc=30&oas=IN8Fz6QDu-J4GaexaXocw.#

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

Bank Name: ROYAL BANK OF CANADA | Branch Name: BURKABY BC MAIN BR.
Bank Number: 00320 | Branch Number: 003
Tax Payer ID: [Redacted] | BIC: ROYCCAT2
Branch Type: ABA

Bank Account

Account Number: XXXXXXXXXXXX7654 | Account Name: TEST BANK AC ARC
Check Digits: [Redacted] | Currency: [Redacted]
IBAN: [Redacted] | Account Status: Approved

Details

Alternate Account Name: [Redacted] | Account Type: [Redacted]
Account Suffix: [Redacted] | Description: [Redacted]
Agency Location Code: [Redacted] | End Date: 30-Aug-2023

Attachments* [1] +
* TIP "Please upload Attachment. Attachment is mandatory"
* [x] I confirm that the attachments have been uploaded.

Comments

Note from Buyer: None
Note to Buyer: [Redacted]

Documents

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

Bank Name: ROYAL BANK OF CANADA | Branch Name: BURKABY BC MAIN BR.
Bank Number: 00320 | Branch Number: 003
Tax Payer ID: [Redacted] | BIC: ROYCCAT2
Branch Type: ABA

Bank Account

Account Number: XXXXXXXXXXXX7654 | Account Name: TEST BANK AC ARC
Check Digits: [Redacted] | Currency: [Redacted]
IBAN: [Redacted] | Account Status: Approved

Details

Alternate Account Name: [Redacted] | Account Type: [Redacted]
Account Suffix: [Redacted] | Description: [Redacted]
Agency Location Code: [Redacted] | End Date: 30-Aug-2023

Attachments* [1] +
* TIP "Please upload Attachment. Attachment is mandatory"
* [x] I confirm that the attachments have been uploaded.

Comments

Note from Buyer: None
Note to Buyer: Updated end date to 30-Aug-2023.

Documents

55. Scroll down to save the changes.

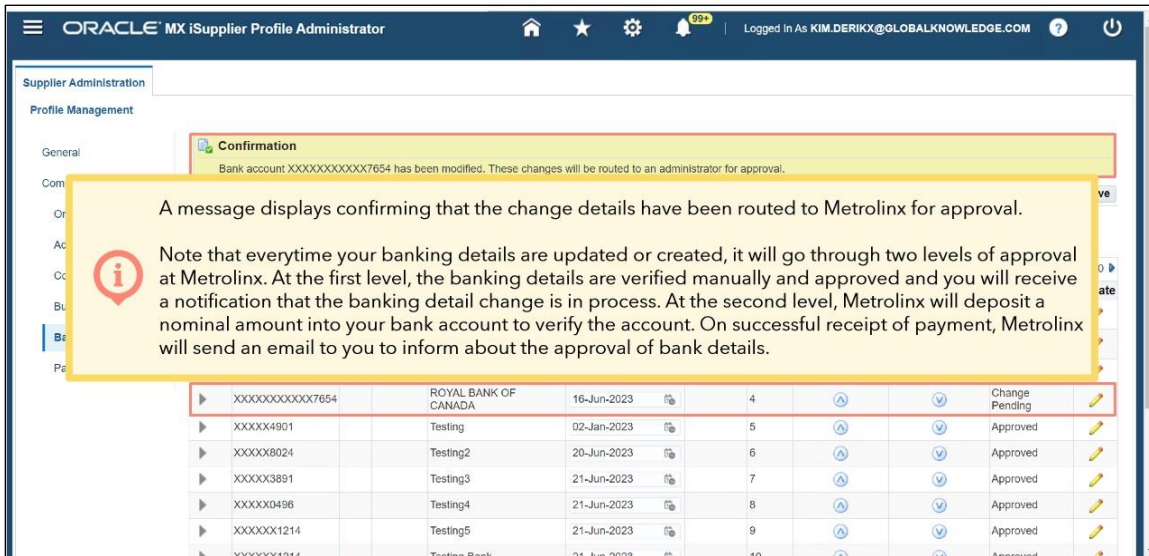
The screenshot shows the 'Bank Account' settings page. At the top, there are fields for 'Bank Name' (ROYAL BANK OF CANADA), 'Bank Number' (00320), 'Tax Payer ID', 'Branch Name' (BURNABY BC MAIN BR.), 'Branch Number' (003), 'BIC' (ROYCCAT2), and 'Branch Type' (ABA). Below this, there are sections for 'Bank Account' details, 'Details', 'Attachments', 'Comments', and 'Documents'. A callout box with the text 'Scroll down to save the changes' points to the bottom of the page.

56. Click the **Save** button.

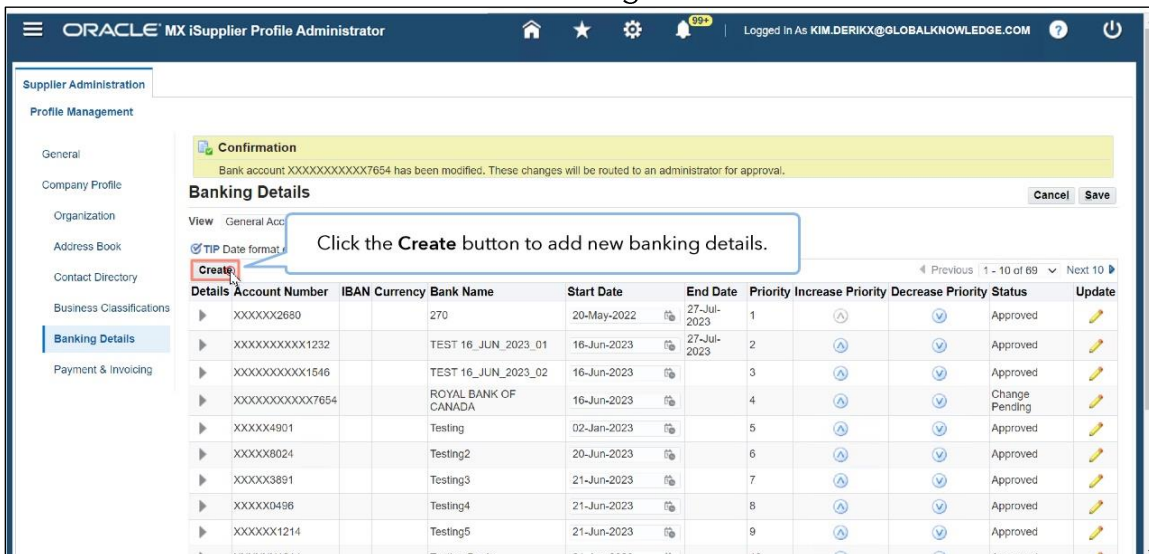
This screenshot is identical to the one above, but with a callout box pointing to the 'Save' button at the bottom right of the page. The 'Save' button is highlighted with a red box. The footer of the page contains the text 'Copyright (c) 1998, 2020, Oracle and/or its affiliates. All rights reserved.' and 'About this Page Privacy Statement...'

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.

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

Note that the 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 Methods" user guide.

Bank

New Bank
 Existing Bank

Bank Name
 Bank Number
 Tax Payer ID

Show Bank Details

Branch

New Branch
 Existing Branch

Branch Name
 Branch Number
 BIC
 Branch Type

Show Branch Details

Bank Account

Account Number
 Check Digits
 IBAN

Show Account Details

Account Name
 Currency
 Account Status

Attachments* **TIP "Please upload Attachment. Attachment is mandatory"**

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.

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.

Account definition must include bank and branch information

Bank

New Bank
 Existing Bank

Bank Name
 Bank Number
 Tax Payer ID

Show Bank Details

Branch

New Branch
 Existing Branch

Branch Name
 Branch Number
 BIC
 Branch Type

Show Branch Details

Bank Account

Account Number
 Check Digits
 IBAN

Show Account Details

Account Name
 Currency
 Account Status

Attachments* **TIP "Please upload Attachment. Attachment is mandatory"**

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.

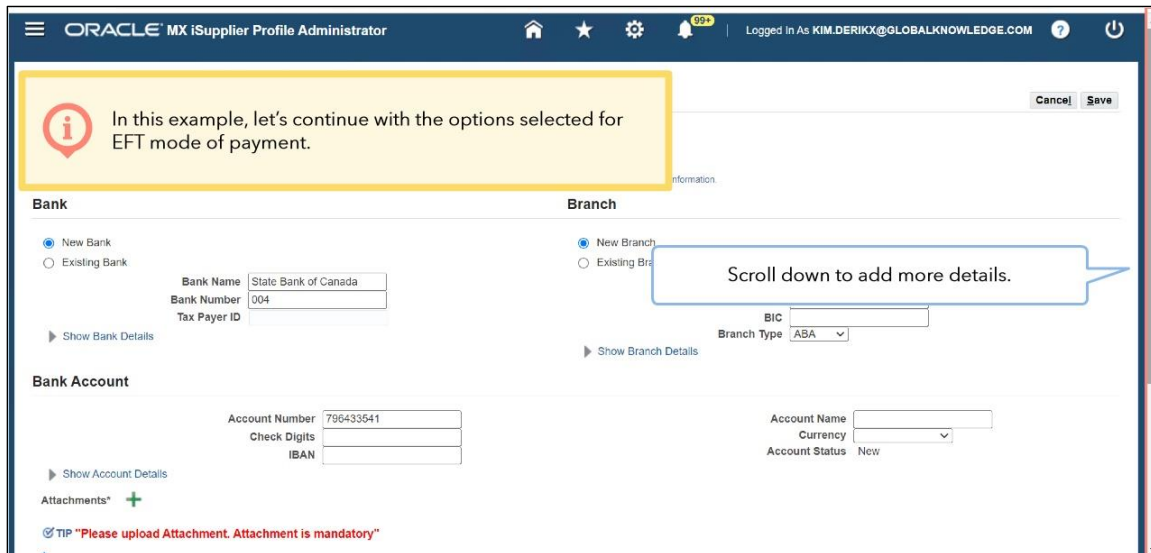
This screenshot shows the 'Create Bank Account' form. A yellow callout box with an information icon contains the text: "In this demonstration, the relevant fields are populated for you. Note that the **Bank Number** and **Branch Number** fields are auto-populated based on the bank or branch selected." The form is divided into three sections: 'Bank', 'Branch', and 'Bank Account'. The 'Bank' section has 'New Bank' selected, with 'State Bank of Canada' and '004' populated. The 'Branch' section has 'New Branch' selected, with 'Main Branch', '00029', and 'ABA' populated. The 'Bank Account' section has 'Account Number', 'Check Digits', and 'IBAN' fields, along with 'Account Name', 'Currency', and 'Account Status' (set to 'New'). A tip at the bottom says "Please upload Attachment. Attachment is mandatory".

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

This screenshot shows the 'Create Bank Account' form with the 'Account Number' field highlighted in red. A blue callout box with a speech bubble icon contains the text: "Enter the account number in the **Account Number** field." The form is the same as in the previous screenshot, but now the 'Account Number' field contains the value '796433541'. The 'Country' is set to 'Canada' and 'Account is used for foreign payments' is checked. The 'Bank' and 'Branch' sections remain populated with the same information as before.

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

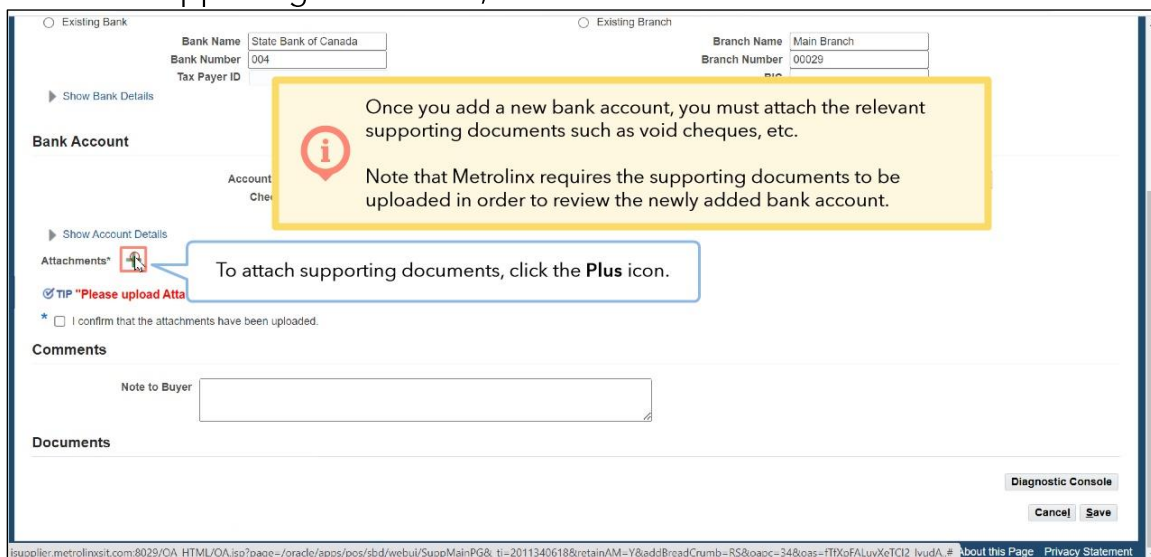
59. Scroll down to add more details.



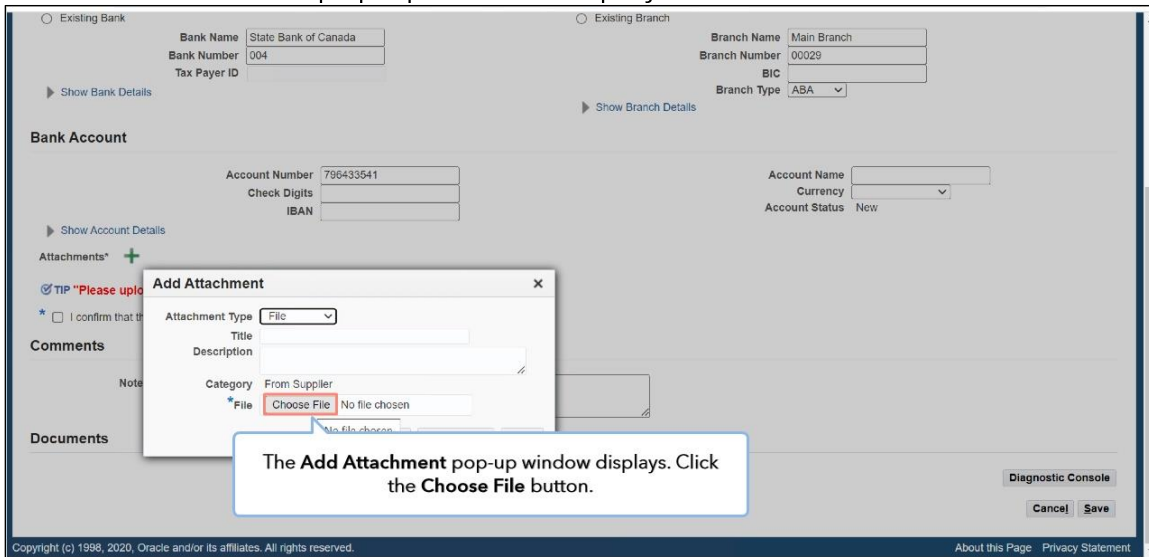
Once you add a new bank account, you must attach the relevant supporting documents such as void cheques, etc.

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

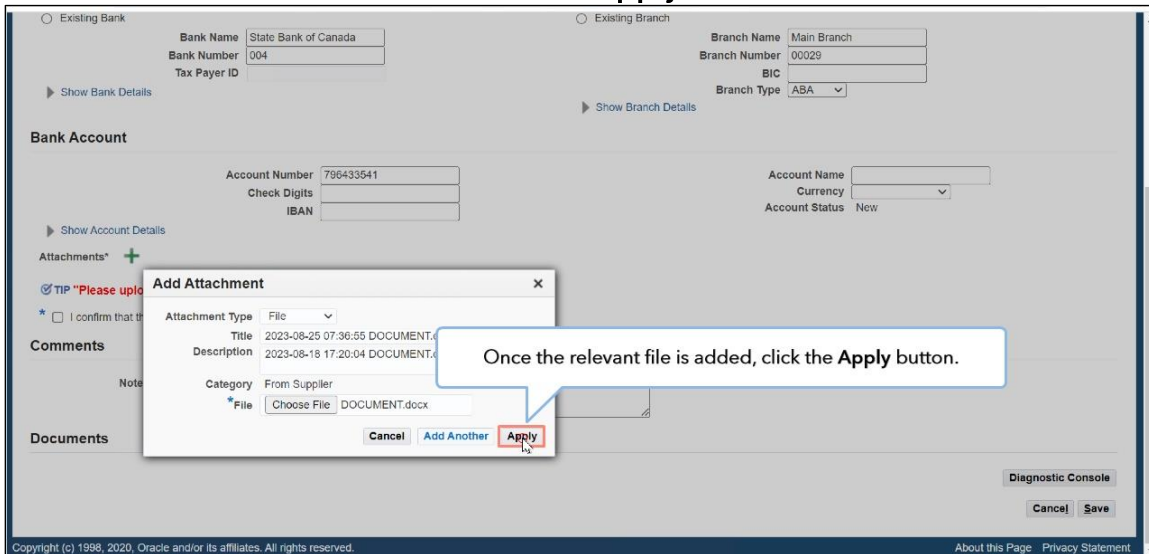
60. To attach supporting documents, click the **Plus** icon.



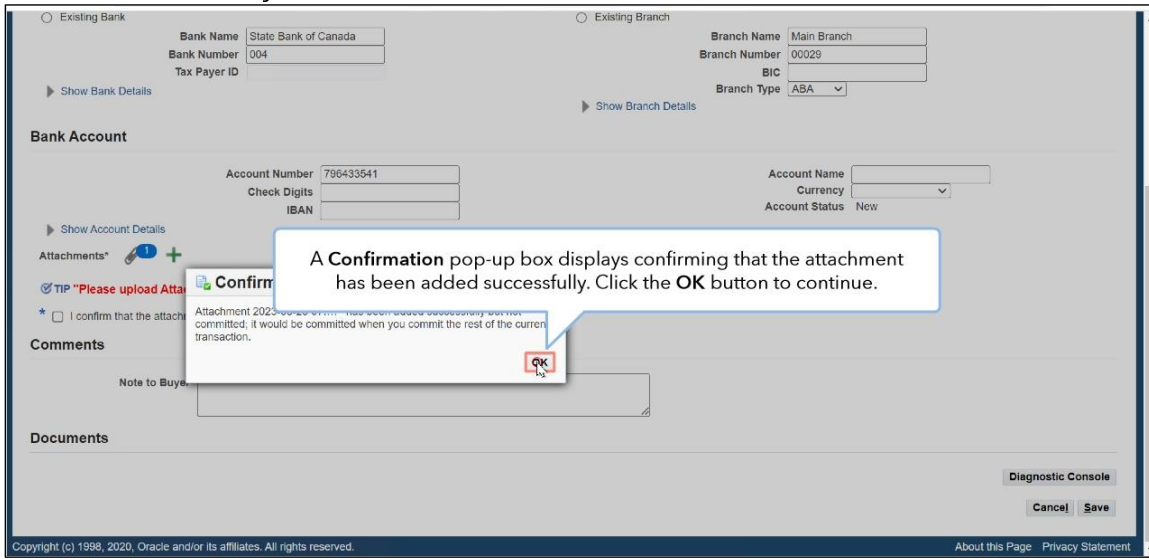
61. The **Add Attachment** pop-up window displays. Click the **Choose File** button.



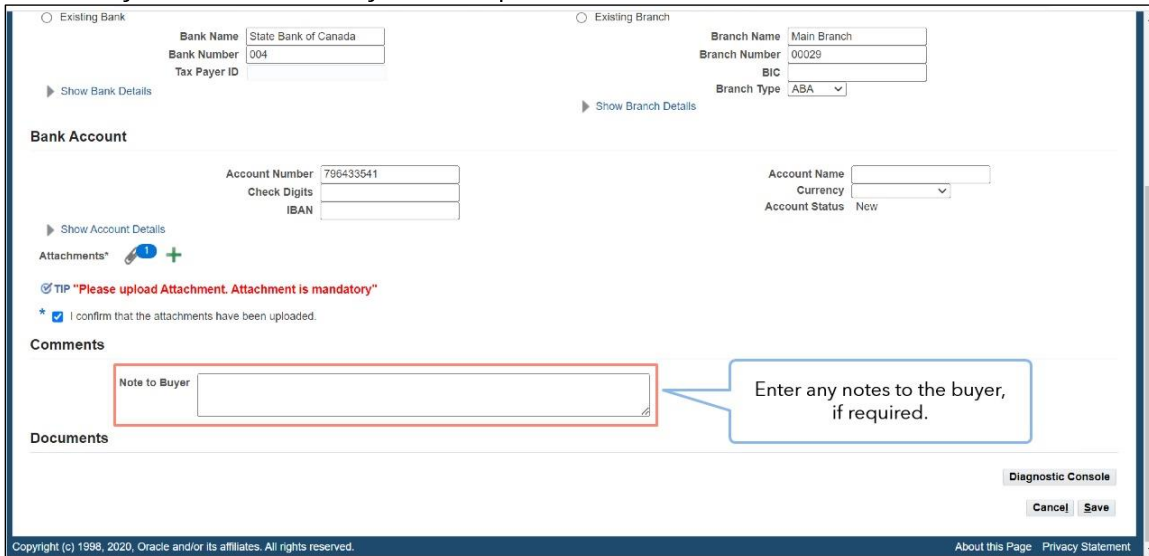
62. Once the relevant file is added, click the **Apply** button.



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.

The screenshot shows a web form for adding a new bank account. At the top, there are sections for 'Existing Bank' and 'Existing Branch'. The 'Existing Bank' section includes fields for Bank Name (State Bank of Canada), Bank Number (004), and Tax Payer ID. The 'Existing Branch' section includes Branch Name (Main Branch), Branch Number (00029), BIC, and Branch Type (ABA). Below these are expandable sections for 'Show Bank Details' and 'Show Branch Details'. The main 'Bank Account' section contains fields for Account Number (796433541), Account Name, Check Digits, Currency, and Account Status (New). A yellow callout box with an information icon contains the text: '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.' Below this callout is a text area labeled 'Note to Buyer' containing the text: 'The Bank account needs to be assigned to our "Home Base" site.' At the bottom right, there are buttons for 'Diagnostic Console', 'Cancel', and 'Save'. The footer contains copyright information and links for 'About this Page' and 'Privacy Statement'.

65. Click the **Save** button.

This screenshot is identical to the previous one, showing the bank account creation form. A blue callout box with a white arrow points to the 'Save' button at the bottom right of the form. The 'Note to Buyer' field is still visible and contains the same text as in the previous screenshot. The 'Save' button is highlighted with a red border in the callout box. The rest of the form, including the bank and branch details, remains the same.

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.

Confirmation
Bank account 796433541 has been added to your company profile. The account information will be routed to an administrator who will review the details and carry out any account verification that is required. You will be notified once the review is complete.

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.

Account Number	Bank Name	Start Date	End Date	Priority	Increase	Decrease	Priority	Status	Update
XXXXXXXXXX7654	ROYAL BANK OF CANADA	16-Jun-2023		4	▲	▼		Change Pending	
XXXXX4901	Testing	02-Jan-2023		5	▲	▼		Approved	
XXXXX8024	Testing2	20-Jun-2023		6	▲	▼		Approved	
XXXXX3891	Testing3	21-Jun-2023		7	▲	▼		Approved	
XXXXX0496	Testing4	21-Jun-2023		8	▲	▼		Approved	
XXXXXX1214	Testing5	21-Jun-2023		9	▲	▼		Approved	

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

Confirmation
Bank account 796433541 has been added to your company profile. The account information will be routed to an administrator who will review the details and carry out any account verification that is required. You will be notified once the review is complete.

Banking Details Cancel Save

View: General Accounts

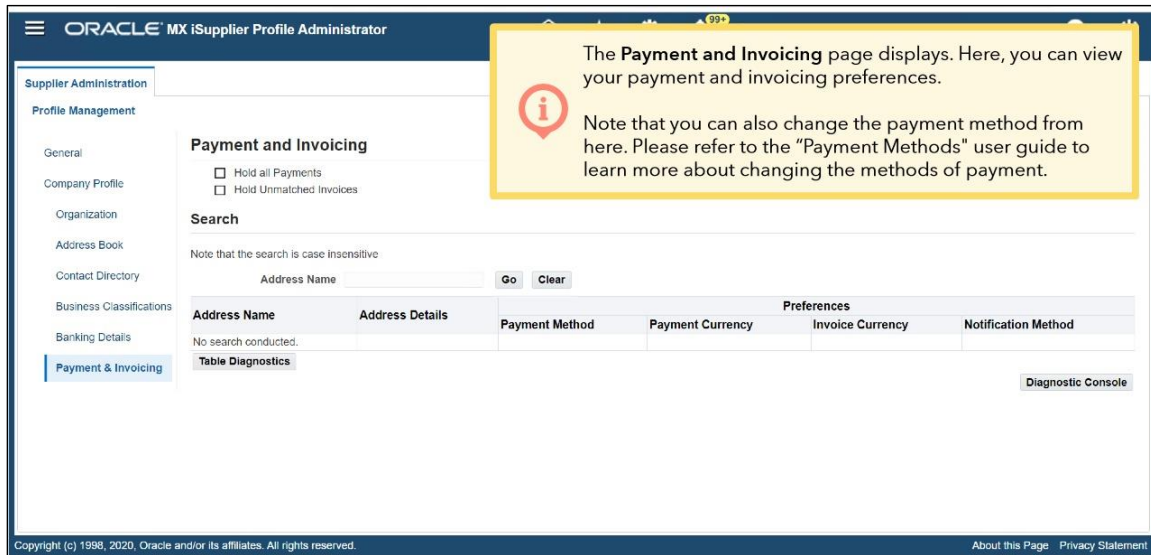
TIP Date format example: 25-Aug-2023

Details	Account Number	IBAN	Currency	Bank Name	Start Date	End Date	Priority	Increase	Decrease	Priority	Status	Update
	XXXXXX2680			270	20-May-2022	27-Jul-2023	1	▲	▼		Approved	
	XXXXXXXXXX1232			TEST 16_JUN_2023_01	16-Jun-2023	27-Jul-2023	2	▲	▼		Approved	
	XXXXXXXXXX1546			TEST 16_JUN_2023_02	16-Jun-2023		3	▲	▼		Approved	
	XXXXXXXXXX7654			ROYAL BANK OF CANADA	16-Jun-2023		4	▲	▼		Change Pending	
					02-Jan-2023		5	▲	▼		Approved	
					20-Jun-2023		6	▲	▼		Approved	
	XXXXX3891			Testing3	21-Jun-2023		7	▲	▼		Approved	
	XXXXX0496			Testing4	21-Jun-2023		8	▲	▼		Approved	
	XXXXXX1214			Testing5	21-Jun-2023		9	▲	▼		Approved	

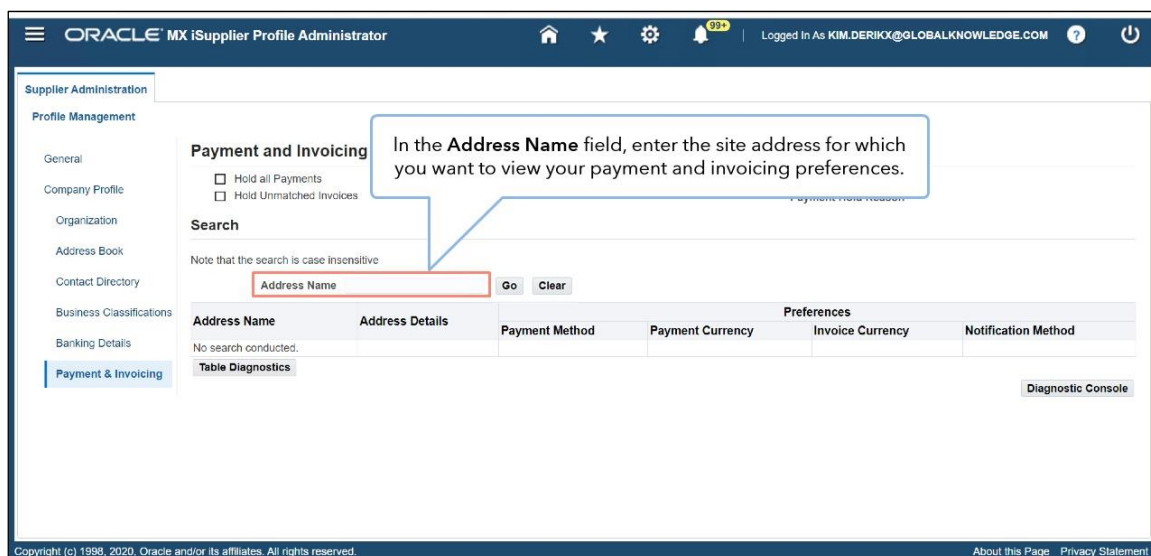
Click the **Payment & Invoicing** section.

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

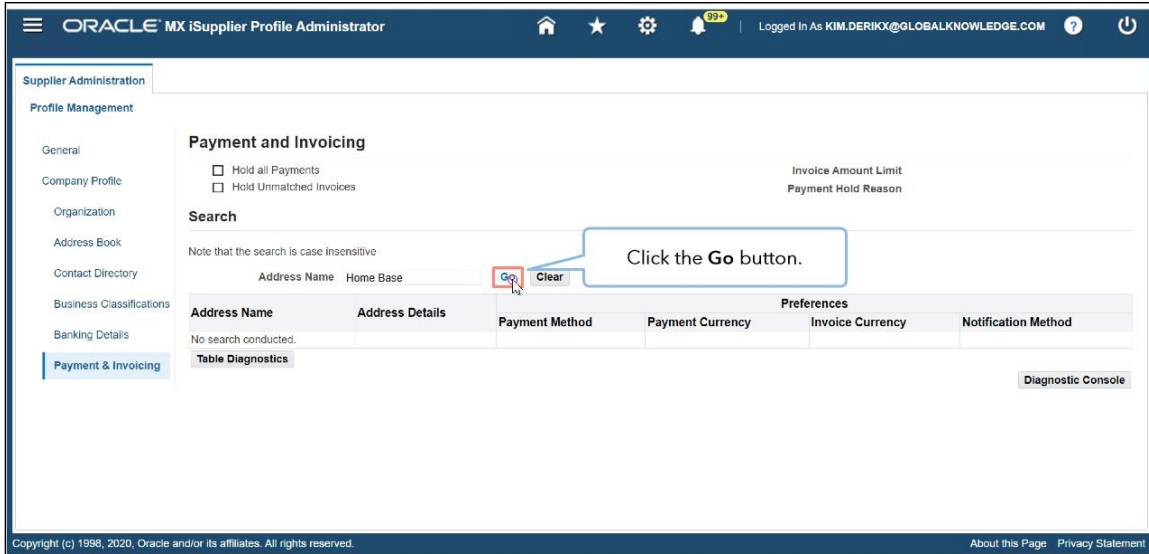
Note: You can also change the mode of payment from here. Please refer to the "Payment Methods" user guide to learn more about changing the mode of payment.



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**.

