Loblaw Companies Limited

Supply Chain Vendor Portal
Vendor Contact Management
User Guide V1.1

VERSION HISTORY

Version	Updated On	Updated By	Comments	Requested By
V1.0	2024-03-28	Manik Kumar		
V1.1	2024-05-01	Manik Kumar	Updated screenshots for new Vendor BU Mapping	

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OVERVIEW

This document gives instructions on how to view and manage contacts from your Vendor organization in the Loblaw Supply Chain Vendor Portal (referred to as "Portal" in this guide). This guide is intended for a dedicated "Super User" from the Vendor in this Portal.

These users can create new users, edit existing users, and remove users from their Vendor organization in the Portal.

If you do not have a "Super User" for your Vendor yet, contact expediter@loblaw.ca to have the first Super User setup.

CLICK TO RETURN BACK TO CONTENTS

Viewing your Vendor's Contacts

Navigate to the Contact Management page from the menu after signing in.

1. **Username and Email:** When a new contact is created, their email is assigned as their username. All users should login with their company email when signing in.
2. **Status:** A status of "Active" means this contact can login into to the Portal and view records according to their Access Role. A status of "Inactive" means the contact has been removed from accessing this Portal by a Super User.
3. **Access Role:** The Access Role determines what kind of records the contact can access. This is assigned by the Super User when creating this contact for this Vendor, and can be edited by the Super User at a later time. An explanation of the roles is below:
   a. **Super User:** This grants full access to all parts of the Portal, including this page to manage other contacts. Ideally, there should only be one Super User per Vendor. If you choose to assign another colleague on your team with Super User access, note that they can have full permissions and manage contact access for all contacts from your Vendor, including you.
   b. **PO Updates User:** This role allows the user to view and update your Vendor's POs readiness for our Inbound Transport operations, in the "PO Updates" page.
   c. **Vendor Infractions User:** This role allows the user to view Vendor Infractions on your POs at our DCs, and send messages / attachments back on those infractions to provide additional evidence, such as for the weekly No Show process.

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d. **Business Closures User:** This role is for Vendor contacts who update business closures for their various sites, to communicate to Loblaw in advance, so that we can adjust product bought from those sites. This allows the user to create and edit those records in the "Business Closures" page.

e. **Data Postings User:** This role is for Vendor contacts who need to view or download the Control Brand Promo, PDP Data, DC Master Data, Code Date Front Shop / Rx Data records from the Data Postings page.

You **can** assign more than one role per user, such as PO Updates and Vendor Infractions, to allow them access to multiple items within the Portal.

Creating a New Contact

Click on the Create button on the top right corner of the list. A form will appear:

For the "**Company Name**" field – if you are a company with no subsidiary companies (i.e., you just have a Vendor BU Number from Loblaws (a seven-digit number beginning with "1")), then you can leave this field as-is.

If you are a company with one or more subsidiary companies (i.e., you have a Parent Vendor number from Loblaws (beginning with "6"), with multiple Vendor BU Numbers for each of your subsidiary companies), then you have **two options** for this new user:

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1. Leave the field as-is to give them access to all subsidiaries with the Access Roles you select. The user will be able to work in this Portal with data for all subsidiary companies based on the Access Roles you select. Example:

Company Name (leave as Parent to access all child BUs, otherwise select a specific BU this user should have access to)

Mars

2. Select a specific subsidiary company to give them access to. The user will only be able to work in this Portal with data for the specific subsidiary company (Vendor BU) that you select, and based on the Access Roles you select. Example:

Pick a specific subsidiary company (ID / name / location hidden as this is a real Vendor – you will see the details on your end).

Click this button to save that selection.

The field will now look like the below, as you've selected a specific subsidiary company (Vendor BU). This user will only have access to that Vendor BU's data in the Portal based on the Access Roles you select.

Company Name (leave as Parent to access all child BUs, otherwise select a specific BU this user should have access to)

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Once ready, click the "Create This Contact" button to create them in the system.

CREATE THIS CONTACT

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After you create the user, the following will happen:

- The user will receive an email at the email address you specified in the form, from LCLSCVendorPortal-Alerts@loblaw.ca, with an invitation code and instructions on how to redeem it.
- The user should follow the instructions in the email to open the link, and then set their own password.
- After setting their password, the user should be able to login and view their relevant items based on the Access Role(s) you selected for them.

If you have any issues with the setup or redeeming in the invitation code, please contact expediter@loblaw.ca for assistance.

Editing / Deactivating an Existing Contact's Access

Next to each row in the list of users, there is a button. Click on that to either edit details for the selected user, or deactivate them and remove their access:

When you edit a contact, you have multiple options apart from editing their name / phone numbers / job title / email address, explained below. All changes to access will take effect the next time the user logs in.

- **Editing their Access Role**
  - o Change the selections in the "Access Role" dropdown – e.g. if this user now also needs to submit Business Closures as well as using the PO Updates / Vendor Infractions section that they already had access to, add the Business Closures option from the dropdown.

    Similarly, remove any options that this user should not have access to, and then save the form from the button at the bottom of the page.

- **Changing the Company a User is mapped to**
  - o If this user is at the Parent Company level, and has access to all subsidiaries of your Parent Company based on the Access Roles you selected, but you would like to switch them to only have access to one subsidiary company - use the dropdown to select the relevant subsidiary to reassign them to, as shown below:

Company Name (leave as Parent to access all child BUs, otherwise select a specific BU this user should have access to)

Mars

> Click here to see the list of subsidiary Companies (Vendor BUs) that you can assign this person to).

Lookup records   ×

Search [🔍]

Choose one record and click Select to continue

✓	Account Name ↑	Vendor ID ↑	City ↑	State / Province ↑
☐	102	102		
☐	103	103		

> Pick a specific subsidiary company (ID / name / location hidden as this is a real Vendor – you will see the details on your end).

> Click this button to save that selection.

SELECT | CANCEL | REMOVE VALUE

Ensure to save your changes by clicking this button at the bottom of the screen →

SAVE YOUR UPDATES FOR THIS CONTACT

Creating Access to Emailed Reports (Distribution List)

As a Vendor Super User, you control what emailed reports are sent to your contacts in the Portal. There are two scenarios:

1. You are from a company with no subsidiary companies (i.e., you just have a seven-digit number beginning with "1" as your Vendor BU Number from Loblaws
   a. In this case, a record will already be created for that BU and Contact combination, with all the options for email reports set to "No". You can edit any of the options to "Yes" by editing the record, explained further below. **You do not need to create any Vendor BU Mapping records in this situation.**

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2. You are a company with one or more subsidiary companies (i.e., you have a Parent Vendor number from Loblaws that begins with "6", with multiple Vendor BU Numbers for each of your subsidiary companies):

   a. You can create records for each of the Vendor BUs under your Parent Company that this colleague should receive any one of the emailed reports for and set the options appropriately.

To create a record for this, start by selecting the "Create a Vendor BU Mapping" button:

Vendor BU Mappings for Emailed Reports: Select the Vendor BU(s) from your Parent Company that this user should receive emailed reports for. If you only have one Vendor BU - edit the options for that BU if needed.

CREATE A VENDOR BU MAPPING

Vendor BU	Vendor BU Name ↑	Parent Vendor Name	Distro List - Vendor Scorecard	Distro List - Compliance Flag	Distro List - Rx Fill Rate	Distro List - Rx Scorecard	Modified On	Created On	Last Contact who Modified this Record	Contact who Created this Record	
102		Mars	Yes	No	No	No					

In this example, the option for "Vendor Scorecard" is selected for Vendor BU 103XXXX under the Parent Company. This sample colleague will receive that scorecard going forward for that Vendor BU.

Select any other options if applicable.

Click this button to select the relevant Vendor BU.

When ready, click this button to save these options.

Once you create the record, it may take a few minutes to show in the table, as we sync it with our background processes. Once complete, you will see a new row with the information you selected:

Vendor BU Mappings for Emailed Reports: Select the Vendor BU(s) from your Parent Company that this user should receive emailed reports for. If you only have one Vendor BU - edit the options for that BU if needed.

CREATE A VENDOR BU MAPPING

Vendor BU	Vendor BU Name ↑	Parent Vendor Name	Distro List - Vendor Scorecard	Distro List - Compliance Flag	Distro List - Rx Fill Rate	Distro List - Rx Scorecard	Modified On	Created On	Last Contact who Modified this Record	Contact who Created this Record	
1027926	1027926 - Mars Canada Inc	Mars	Yes	No	No	No	2024-04-30 11:08	2024-04-29 22:48	Manik Kumar	Derek Smith	🔽
1033855	1033855 - Mars Canada Inc	Mars	Yes	No	No	No	2024-04-30 11:09	2024-04-30 11:09		Manik Kumar	🔽

Editing Access to Emailed Reports (Distribution List)

To edit an existing mapping for a Vendor BU and the options that this contact is receiving for that BU, click on the edit button on a record.

You can either remove the record entirely, and the contact will not receive any items going forward for that Vendor BU, or you can edit the record to change the item they receive for that Vendor BU.

In the Edit form, update the selections as appropriate, and click on the "Save Changes" button.

This is shown on the next page.

✎ Edit   ✕

Vendor BU   Selected Vendor BU:

102 ▓▓▓▓▓▓▓▓   Vendor ID *

Contact   102 ▓▓▓▓▓▓▓▓

Derek Smith   Vendor Name *

                                                 102 ▓▓▓▓▓▓▓▓

                                                 Parent Vendor
Update the items that this Contact should
receive for the selected Vendor BU: Mars

☑ Vendor Scorecard?   City
☐ Compliance Flag?
☐ Rx Fill Rate?   ▓▓▓▓▓▓▓▓
☐ Rx Scorecard?
                                                 State / Province

                                                 ▓▓▓▓▓▓▓▓

                                                 Country

                                                 ▓▓▓▓▓▓▓▓

SAVE CHANGES