



Wincanton

At the heart of British supply chains

Step By Step Guide

How to register on Wincanton's Oracle Cloud platform

Step 1 – Company Details

Please complete all the necessary fields

The screenshot shows the 'Company Details' form in the Wincanton Supplier Registration system. The form includes the following fields and sections:

- Company** (Required)
- Website** (Required)
- Country** (Required)
- Taxpayer ID** (Required)
- Tax Registration Number** (Required)
- D-U-N-S Number** (Required)
- Organization Type** (Required)
- Supplier Type** (Required)
- Note to Approver** (Text area)
- Attach tax, insurance, and other relevant documents** (Section with a **Drag and Drop** area for file uploads and a **URL** field with an **Add URL** button)

At the bottom of the form are buttons for **Cancel**, **Save**, and **Continue**. A sidebar on the right shows a progress indicator '1 | 5' and a list of steps: **Company Details**, **Contacts**, **Addresses**, **Bank Accounts**, and **Questionnaire**.

Mandatory fields for completion:
Company Details:

- Company Trading Name
- Country
- Tax Registration Number (must begin with 'GB')
- D-U-N-S Number
- Organisation Type

Click on 'Continue' to proceed to step 2

Step 2 – Contacts

Contacts for your account

Supplier Registration

Contacts

Contact 1
Enter contact details. Registration communications will be sent to this contact.

First Name Last Name Email

Job Title Country Mobile

Country Phone Ext

Country Fax

Is this an administrative contact? Yes No
Administrative contact will receive general communications from us.

Does this contact need a user account? Yes No
User accounts will provide online access to supplier transactions and self-service tasks.

What user roles does this contact need?
Assign at least 1 user role to specify the responsibilities of the contact.

XCW Supplier Accounts Receivable Specialist Custom

Updated just now

Cancel Save Continue

This screen allows you to create contacts that will be against the supplier record and whether they are an administrative contact and if they need a user account.

Setting up a contact with a user account will allow them to access the supplier portal after registration to enable them to:

- View purchase orders
- View invoices and associated payment status
- Manage your supplier profile

Please do not amend the roles selected.

Click on 'Continue' to proceed to step 3

Step 3 – Addresses

Setting up addresses against your record

Supplier Registration

Addresses

Enter at least one address.

Address 1 🗑️

Address Name Required

What's this address used for? Select at least 1 purpose.

Receive Purchase Orders Receive Payments Bid on RFQs

Country/Region
United Kingdom

Address Line 1 Required Address Line 2 Address Line 3

City or Town Required County Postcode

Email Country GB Phone +44 Ext

Country GB Fax +44

Which contacts are associated to this address?

[Redacted] .co.uk

Updated just now Cancel Save Continue

3 | 5

Please complete as follows:

- **Address 1/Name:** populate with 'Sales'
- **Address Line 1**
- **City or Town**
- **Postcode**

Email: you can either link the contact from the previous step or populate this with the required email address.

Step 3 – Addresses continued

Setting up addresses against your record

What's this address used for? Select at least 1 purpose.

Receive Purchase Orders Receive Payments Bid on RFQs

What's this address used for?

select 'Receive Purchase Orders' and/or 'Receive Payments'

Please note if you select the PO and payment options then both of those emails will be sent to this email address.

If this needs to be different email addresses then please set up two different address locations.

Click on 'Continue' to proceed to step 4

Step 4 – Bank Account

Bank account for payments to be made to

Please complete the following as a minimum:

- Country
- Sort Code
- Bank Branch
- Account Number
- IBAN (if you have a UK branch than an IBAN number is not required. If you are transacting with a foreign bank then an IBAN number is required)
- Currency
- Account Holder

Supplier Registration

Bank Accounts

Bank account 1

Country
United Kingdom

Sort Code Required

Bank

Bank Branch

Account Number

IBAN

Currency

Account Type

Account Holder Required

Building Society Roll Number

+ Add Another Bank Account

Updated just now

Cancel Save Continue

4 | 5

Company Details

Contacts

Addresses

Bank Accounts

Questionnaire

Click on 'Continue' to proceed to step 5

Step 5 – Questionnaire

Please complete

The screenshot shows a web form titled "Supplier Registration Questionnaire". It is part of a "Supplier Onboarding" process, specifically "Section 1 of 1". The form contains several sections:

- 1. Are you registered with Achilles?** (Required)
 - a. Yes
 - b. No
- 1.a.1. Please provide your Achilles 8 digit Membership Number** (Required)
 - Text input field
- 1.a.2. Please attach one of the following so your bank details can be validated:** (Required)
 - 1 - A copy of a paying in slip and confirmation of address eg. Letter or compliment slip
 - 2 - Bank details stated on letterhead stationary, signed by a authorised Director of your organisation
 - Text input field
 - Required
 - Attachment button: Add Attachments (0)

At the bottom of the form, there are buttons for "Cancel", "Save", and "Submit". The "Submit" button is highlighted in dark grey. On the right side of the form, there is a dark sidebar with a progress indicator "5 | 5" and a list of menu items: "Company Details", "Contacts", "Addresses", "Bank Accounts", and "Questionnaire". The "Questionnaire" item is currently selected and highlighted.

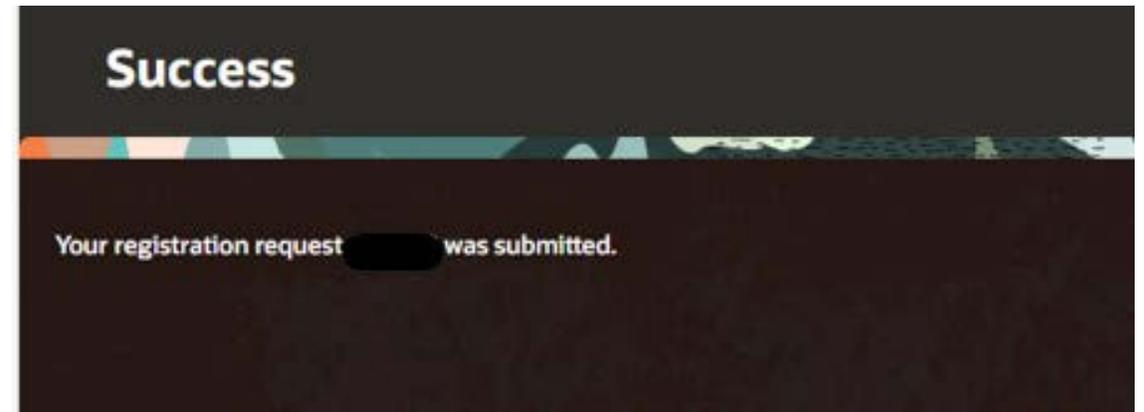
1. Please complete the questionnaire
2. If you have insurances, then attach this document for each requirement in the questionnaire. In the text box associated with the attachment, type in the word 'attachment'
3. For non Self-Bill customers, attach a copy of you letter head in the questionnaire
4. Please note any missing answers or missing information will mean that the set up of your account will be delayed
5. Once completed please select 'Submit' in the right hand corner to proceed
6. If using a factoring business, then tick the box Y/N with a 'Yes' and answer the additional questions posed

Next Steps & Timelines

Once you have submitted your registration you will get a success notification. This will then be sent to the Wincanton team to review and approve if appropriate.

This will go through a number of checks to validate the information and once fully approved, you will be available for requesters to raise purchase orders against.

Should you have any questions then please contact the Procurement Operations Team:
Email - supplier.request@wincanton.co.uk



Thank you