

Vendor Onboarding Checklist Job Aid

Vendor Onboarding Checklist

Welcome! An email with a link to access Vendor Workflow should accompany this checklist. Use your login credentials to complete the vendor setup process.

Merchandising vendors should use this checklist to ensure mandatory onboarding activities are completed for Vendor Workflow and information on next steps related to accessing the Loblaw Vendor Portal after the vendor setup is complete.

	Checklist Item	Checklist Description	Resources/Additional Help
<input type="checkbox"/>	Loblaw Vendor Portal System Requirements	<p>Before you access the Loblaw Vendor Portal please ensure your system is up to date with:</p> <ul style="list-style-type: none"> • A computing device capable of running one or more of the following browsers: <ul style="list-style-type: none"> o Internet Explorer 11.1 and above o Google Chrome o Firefox o Safari • A viable broadband internet connection. • A screen display of at least 1280 x 800. • A computing device running a minimum of Windows 7 or OSx10.8, Mountain Lion. 	<p>Training Guides/Job Aids</p> <p><i>These can be found at Loblaw.ca/Vendor under Reference Materials</i></p> <ul style="list-style-type: none"> • Loblaw Vendor Portal-Browser Settings
<input type="checkbox"/> <input type="checkbox"/>	Vendor Buying Agreement (VBA)	<p>Vendors will be expected to read the Terms and Conditions, enter their information, and complete the required forms e.g. Vendor Buying Agreement (VBA) through the Vendor Workflow tool.</p> <p>Signing of the VBA indicates agreement of the Terms and Conditions.</p> <p>Note: The Legal Name provided should be also the name listed on the Vendor Buying Agreement (VBA), Insurance documents and on the CRA website (for GST validation).</p> <p>Vendors should be advised to review the terms and conditions within their organization's general counsel.</p> <p>You will need to access and review the following Loblaw SOPs (as applicable):</p> <ul style="list-style-type: none"> • SOP - Vendors and Carriers • SOP - Offshore 	<p>For VBA questions email CDPVendor@loblaw.ca</p>

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		<ul style="list-style-type: none"> Control Brand Vendor Operating Standards Produce Vendor Operating Standards Loblaw as Importer of Record Food Safety Standards <p>If you do business with Shoppers Drug Mart, please select the SDM Toolkit tile through the Vendor Portal to review any relevant policies or SOPS.</p> <p>Important: Be prepared to confirm that you have read, understood and agree to the Food Safety standards according to the Safe Food for Canadians Act (SFCA) and/or when Loblaw is the Importer of Record.</p>	
	Vendor Income Profile	<p>Vendors will be expected to complete their information based on their conversation with the Category Director.</p> <p>By signing this Vendor Income Profile (VIP), the signatory confirms the authority to bind the Vendor, and agrees, on behalf of the Vendor, to the rates specified.</p> <p>The Vendor acknowledges and agrees that such rates apply as of the Effective Date, are non-exhaustive (e.g. incremental rates may apply, as required), and may change from time to time.</p> <p>Please fully complete the VIP form and upload the signed document on the App in PDF format. Signing of the VIP indicates agreement of the vendor income rates..</p> <p>Note: The VIP form will need to be physically signed and upload to Vendor Workflow.</p>	<p>Training Guides/Job Aids</p> <p>This can reviewed or download under the Job Aids tab via the Vendor Portal.</p> <ul style="list-style-type: none"> Uploading Mandatory Documents
	iTrade Vendors (If Applicable)	<p>Register an account with iTrade before setting up in the Vendor Workflow tool.</p> <p>Note: Please record your unique vendor iTrade number which will be sent to you in your iTrade On-Boarding Package. You will need to input this into the Vendor Workflow tool to sync your information.</p>	<p>Training Guides/Job Aids</p> <p><i>Reach out to iTrade to create an account. You will receive a Welcome e-mail that contains an Information Sheet on how to create an iTrade account.</i></p>
	Vendor Workflow	<p>All new vendors will need to go through the Vendor Workflow tool to be setup. Your internal support contact will initiate this process and you will receive a welcome email with setup details.</p>	<p>Training Guides/Job Aids</p>

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		<p>Note: During your initial discussion with Category, please note that the contact name provided will be the same person who will receive the welcome email to complete the setup via Vendor Workflow. This person will also be responsible for providing access to their colleagues for the Loblaw Vendor Portal within their organization.</p> <p>Note: You should provide emails with unique / non-generic domains. Generic names are not permitted. (e.g. info@, sales@, etc.)</p> <p>Generic domains are only permitted for small vendors that do not have a company domain. (e.g. @yahoo, @gmail).</p>	<p><i>These can be found via the Loblaw Vendor Portal under the Job Aids tab:</i></p> <ul style="list-style-type: none"> • Vendor Workflow Steps and Roles • Vendor Workflow for Vendors- Overview and Basic Navigation • Merchandising Vendor Setup and Maintenance in Vendor Workflow <p>Vendor Workflow support email CDPVendor@loblaw.ca</p>
	<p>Loblaw Vendor Portal</p>	<p>Once setup, the contact name provided in Vendor Workflow will automatically be assigned as the primary Portal Administrator for the Loblaw Vendor Portal.</p> <p>The Portal Administrator will be able to provision access to additional Administrators and users within your organization.</p> <p>You will be responsible for adding a Secondary Administrator who should be considered as a back-up to support managing portal users in the Loblaw Vendor Portal.</p> <p>Note: An optional third admin can be added and Portal administrators will be maintained by the vendor.</p> <p>Note: All users are required to have unique e-mail addresses, even if multiple users use the same e-mail.</p>	<p>Training Guides/Job Aids</p> <p><i>These can be found via the Loblaw Vendor Portal under the Job Aids tab:</i></p> <ul style="list-style-type: none"> • First Time User Login • Vendor Self-Serve • Managing Portal Users (For Vendor Admins) <p>Reach out to your internal support contact if you do not receive a welcome email.</p> <p>For Loblaw Vendor Portal support please fill out the <i>Loblaw Vendor Portal Support Form</i> which can be found at http://www.loblaw.ca/vendor under the “Help” section.</p>

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<input type="checkbox"/>	<p>Product and Liability Insurance</p>	<p>Product and liability insurance (PLI) is required to ensure the vendor is protected in case the product brings harm, injury or death to a Loblaw customer.</p> <ul style="list-style-type: none"> • Vendors must be prepared to produce an Insurance Certificate showing coverage of \$10M or more. • The Insurance documents must have Loblaw Companies Limited listed as an additional insured entity. 	
<input type="checkbox"/>	<p>Payment Terms</p>	<p>Standard payment terms will apply. Any potential changes should be discussed with your internal support contact.</p>	<p>For questions email CDPVendor@loblaw.ca</p> <p>Standard Payment Term Policy</p>
<input type="checkbox"/>	<p>Banking information</p>	<p>Be prepared to provide relevant bank account information and upload a copy of a void cheque during the setup process. You can also expect a follow-up verification phone call from your internal support contact.</p>	<p>For questions on banking information please reach out to your bank.</p>
<input type="checkbox"/>	<p>Tax exemptions</p>	<p>You will need to print and sign a declaration form if your business is exempt from CRA taxes.</p>	<p>For questions email CDPVendor@loblaw.ca</p>
<input type="checkbox"/>	<p>GS1 Vendors and Global Location Number (GLN)</p>	<p>GS1 Canada provides vendors with access to ECCNet Registry, a single point of access between vendors and retailers, allowing vendors to maintain accurate product information in one central registry and input information just one time for all retail partners.</p> <p>All the vendors that supply Loblaw with fixed weight, packaged goods are required to be registered on ECCNet to list their items.</p> <p>Be sure to add Loblaw as a trading partner and publish your catalogue of items to Loblaw, or you will not be able to access your catalogue in Article Workflow.</p> <p>Note: GS1 does not apply to offshore or produce vendors. (Variable weight articles)</p> <p>A GLN is part of the GS1 system of standards and is used to identify a company's location, including stores and warehouses, and this information will need to be provided</p>	<p>ECCNet</p> <p>GS1 support</p> <ul style="list-style-type: none"> • Phone: + 1 416 510 8039 • Website: www.gs1ca.org • Email: info@gs1ca.org

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		to Loblaw. If you are dealing with any brokers who might be selling your products to Loblaw, they need to be listed as well as their GLN(s).	
<input type="checkbox"/>	Importer of Record (IOR)	<p>Please be prepared to advise who will be responsible for clearing customs and paying duties and taxes.</p> <p>Note: If Loblaw Enterprise is the importer of record (IOR), the cost of goods should not include the cost of clearing customs. Also, all food vendors must commit or met the requirements for the food safety standards as a pre-qualification when Loblaw Enterprise is the Importer of Record and must be met by the time article creation is initiated.</p>	
<input type="checkbox"/>	Environmental Stewardship/ Blue Box Program	<p>If you own, rent, or lease property or have an employee within a province then the registration numbers provided by the stewardship agencies in all provinces (ON, BC, MB, SK, QC) are required.</p> <p><u>Exemptions</u></p> <p>Produce (fruits and vegetables) without any packaging.</p>	<p>For ON, BC, MB & SK refer to this guide Complete Guidebook</p> <p>For Quebec, refer to this link for support: Stewardship - Quebec</p> <p>Please download the guides via the websites above for more information.</p>
<input type="checkbox"/>	Data Universal Number System (DUNS) Registration number (Optional)	The number is a unique 9 digit number for businesses assigned by Dunn & Bradstreet to a vendor engaged in electronic commerce.	Dun and Bradstreet Site
<input type="checkbox"/>	Electronic Data Interchange (EDI)	<p>Electronic Data Interchange (EDI) is a computer-based solution allowing the vendor and Loblaw to exchange business documents electronically (e.g., purchase orders, invoices, debit memos). It is a requirement for vendors (unless otherwise agreed to by Loblaw) to be EDI compliant. The EDI standard and vendor obligations are set out in the Loblaw Supplier Terms and Conditions.</p> <p>Note: Offshore Vendors and Produce iTrade customers are an exception to EDI.</p>	
<input type="checkbox"/>	A/R & P.O creation	<p>Contact information will be required for Accounts Receivable and PO creation inquiries.</p> <p>Mandatory Fields:</p>	

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		<ul style="list-style-type: none"> • PO Notification, • Accounts Receivable, • Supply Chain Lead, • Customer Service Manager • Key Account Representative 	
	Direct Store Delivery (DSD) / Warehouse	<p>Please be prepared to provide details on how the product will be delivered; i.e.: to Distribution centres or stores, store locations, and delivery schedules.</p> <p>Note: If you supply Loblaw Enterprise with both Control Brand and National Brand products and the Importer of Record differs for each (e.g. Loblaw is IOR for Control Brand products but you are IOR for National Brand products that come from the same shipping location), a duplicate Shipping Location must be setup to record the correct IOR for each product type. This is the only time a duplicate shipping location will be setup.</p>	
	Consolidation, Distribution Centre, and Production Facility Locations	<p>If applicable, you will have to provide the address details for all consolidation (e.g. Produce Vendors), distribution centres, and factory locations, which will be required when filling out the vendor setup form.</p> <p>Note: All Production Facilities must link to a Shipping Location.</p>	
	Reclamation	<p>Please be aware that Loblaw vendors are automatically enrolled in the Reclamation process (Cost Recovery) when supplying products for applicable Merchandise Categories. This process manages an exit strategy for products damaged in the supply chain. The purpose is to ensure products eligible for cost recovery (reclamation and credit) are not incorrectly scrapped.</p>	
	DC Exit Strategy	<p>This is the strategy to manage the remaining delisted inventory in the DC. You will need to select yes under the DC Exit Strategy field in Vendor Workflow. Yes confirms that you will pick up/destroy of the identified inventory.</p>	<p>For questions email CDPVendor@loblaw.ca</p>
	Store Exit Strategy	<p>This is the strategy to manage remaining delisted inventory in the Stores for Shoppers Drug Mart . Ensure you select the correct option from the Store Exit drop down list in Vendor Workflow.</p>	<p>For questions email CDPVendor@loblaw.ca</p>

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	<p>Vendor Transition</p>	<p>Contact Category if you require to transition or consolidate accounts.</p> <p>Complete the following form if applicable:</p> <ul style="list-style-type: none"> • Parent Company Authorization to access Loblaw Vendor Portal Form <p>Note: This form will need to be completed if you are an organization or division that will need to be added to a parent organization.</p> <p>By providing consent you will be allowing the identified parent company to access all apps and data related to your organization via the portal.</p>	
	<p>Broker</p>	<p><u>New Broker</u></p> <ul style="list-style-type: none"> • Notify the Central Data Procurement (CDP) team if you are managing articles for a principal. • Complete the following form provided by CDP : <ul style="list-style-type: none"> ○ Online Broker Consent Form • Return Completed and signed forms to CDP. <p><u>Broker adds new Principal</u></p> <ul style="list-style-type: none"> • Notify CDP that you have new principal. • Email the complete and signed Broker Consent form to CDP. 	<p>For questions email CDPVendor@loblaw.ca</p>
	<p>Principal</p>	<p><u>Principal Changes Broker</u></p> <ul style="list-style-type: none"> • Notify CDP that you have left broker for another broker. • Email complete and signed Broker Setup form to CDP. <p><u>Principal leaves Broker</u></p> <ul style="list-style-type: none"> • Notify CDP that you have left broker and directly dealing with Loblaw. • Send complete and signed Principal Consent Removal form to CDP. 	<p>For questions email CDPVendor@loblaw.ca</p>