





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
	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 aboveo Google Chromeo Firefoxo 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
	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>For VBA questions email CDPVendor@loblaw.ca</p>

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		<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 • Control Brand Vendor Operating Standards • Produce Vendor Operating Standards • Loblaw as Importer of Record Food Safety Standards <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>	
	iTrade Vendors	<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>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>Training Guides/Job Aids</p> <p><i>These can be found via the Training Document Centre in Vendor Workflow</i></p> <ul style="list-style-type: none"> • How to Access Vendor Workflow • Accessing the Training Document Centre • Vendor Workflow Steps and Roles • Vendor Workflow for Vendors- Overview and Basic Navigation





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			Vendor Workflow support email CDPVendor@loblaw.ca
	Loblaw Vendor Portal	<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 under the www.loblaw.ca/Vendor site.</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>
	Product and Liability Insurance	<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. 	

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		<ul style="list-style-type: none"> The Insurance documents must have Loblaw Companies Limited listed as an additional insured entity. 	
<input type="checkbox"/>	Payment Terms	Standard payment terms will apply. Any potential changes should be discussed with your internal support contact.	<p>For questions email CDPVendor@loblaw.ca</p> <p>Standard Payment Term Policy</p>
<input type="checkbox"/>	Banking information	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.	For questions on banking information please reach out to your bank.
<input type="checkbox"/>	Tax exemptions	You will need to print and sign a declaration form if your business is exempt from CRA taxes.	For questions email CDPVendor@loblaw.ca
<input type="checkbox"/>	GS1 Vendors and Global Location Number (GLN)	<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 to Loblaw. If you are dealing</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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		with any brokers who might be selling your products to Loblaw, they need to be listed as well as their GLN(s).	
	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 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 is the Importer of Record and must be met by the time article creation is initiated.</p>	
	Stewardship	<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>
	Data Universal Number System (DUNS) Registration number	<p>Ensure you have a DUNS number in order to be setup with Loblaw. The number is a unique 9 digit number for businesses assigned by Dunn & Bradstreet to a vendor engaged in electronic commerce.</p> <p>Note: If you are an iTrade Vendor you will not require a DUNS number.</p>	Dun and Bradstreet Site
	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>	

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		Note: Offshore Vendors and Produce iTrade customers are an exception to EDI.	
<input type="checkbox"/>	A/R & P.O creation	Contact information will be required for Accounts Receivable and PO creation inquiries.	
<input type="checkbox"/>	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 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>	
<input type="checkbox"/>	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>	
<input type="checkbox"/>	Reclamation	Please be aware that all 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.	
<input type="checkbox"/>	Vendor Transition	<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 	

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	Broker	<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 forms provided by CDP : <ul style="list-style-type: none"> ○ Online Broker Consent Form ○ VBA • 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. • Send complete and signed forms (VBA and online Broker Consent form) to CDP. 	
	Principal	<p><u>Principal Changes Broker</u></p> <ul style="list-style-type: none"> • Notify CDP that you have left broker for another broker. • Send complete and signed forms (VBA and online 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. 	