

Supplier Self Registration Quick Reference Guide



- Steps for Supplier Registration:
 - Invitation sent by buyer or ADP.
 - Supplier will need to open the email and click on the link to navigate to OpenInvoice registration wizard.

www.openinvoice.com

- Supplier enter/verify:
 - Legal Company Name
 - Company Contact Email
- Select '**Next**'.

OpenInvoice Registration Invitation

[Back to messages](#) |

To: adp-test@live.com [Add to contacts](#)

26/05/2011

[Reply](#)

Attachments, pictures and links in this message have been blocked for your safety.
[Show content](#) | [Always show content from michelle_hinrichs@adp.com](#)

Dear ADP Test Supplier Registration1,

Michelle's Buyer Company has invited your company to register with the OpenInvoice Electronic Invoice Presentation and Payment system, an easy-to-use web-based invoicing tool that enables sellers to create, submit, manage and review payment status of invoices and purchasing documents online.

If you have any questions, contact docptest@adp.com or call our support line at 1-866-627-3287.

Click the following link to register now.

<https://docptest.openinvoice.com/docp/guest/registerPreScreen/cd50f3e0-bb34-448e-b6b4-0a6f384bbdc8>

Click here to learn more about ADP:

<http://www.adp.com/solutions/employer-services/adp-accounts-payable-solution.aspx>

Sincerely,
The ADP Service Delivery Team.

This e-mail is intended only for the named addressee. If you have received this message in error, please notify ADP and delete the original message. Thank you.

This message and any attachments are intended only for the use of the addressee and may contain information that is privileged and confidential. If the reader of the message is not the intended recipient or an authorized representative of the intended recipient, you are hereby notified that any dissemination of this communication is strictly prohibited. If you have received this communication in error, notify the sender immediately by return email and delete the message and any attachments from your system.



OpenInvoice™

Self Registration

Please confirm the name of your company below.

It is important that you use the formal, legal name of your company as it should appear on invoices and other documents.

Legal Company Name:

Supplier Company2

Company Contact Email:

adp-test2@live.ca

After you click **Next>>**, please be patient as we search to see if your company has already registered with us.

This may take up to several minutes.

Next >>

Supplier Self Registration Quick Reference Guide



- Verify company
 - If already registered, they may choose company name, then click next.
 - If company not in on the list, click **'My company is not on this list'** and click **'Next'**.

OpenInvoice™

Verify Company

Legal Company Name: Supplier Company2

Review the list below to see if your company is already registered with OpenInvoice. If it appears in the list, select the appropriate circle to the left of your company name. Click **Next>>**

My company is not on this list.

	Company Name	Site Name - Address
<input type="radio"/>	2010 Audit supplier company	Calgary - Calgary , AB Canada
<input type="radio"/>	ACME Supplier Services	ADP - Calgary , AB Canada Colorado - Colorado Springs , CO United States of America Devon - Calgary , AB Canada Head Office - Calgary , AB Canada Houston Operations - Houston , TX United States of America Lafayette - Lloydminster , AB Canada

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- Enter/verify company address and contact information (all highlighted fields are mandatory).
- Select **'Next'**.

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Company Information

All fields are case sensitive and highlighted fields are mandatory.

Please enter your information in the fields below

- Name and Address -

This information will appear on invoices.

Legal Company Name: Supplier Company2

Company Address 1: 1234 Test Street

Company Address 2:

Country: Canada

State/Prov/Other: Alberta

City: Calgary

Zip/Postal Code: T3G 5Z4

Main Phone: (403) 303-8441

- Contact Information -

Email Address: adp-test2@live.ca

First Name: Mike

Last Name: Smith

User Name: mikesmith

Password: ●●●●●●●●

Verify Password: ●●●●●●●●

<< Previous

Next >>

Password must be at least 8 characters long and contain:

- at least one upper case character
- at least one lower case character
- at least one number

Password cannot include:

- more than 3 consecutive repeated characters ('aaaa' or '1111')
- more than 2 consecutive characters ('abd' or '123')
- more than 3 consecutive characters from your username
- the word 'password' ('Apassword1')

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- Review information as entered, click '**Continue**' or previous if changes need to be made.

OpenInvoice™

Verify Company Information

Please review your information below. If a correction is necessary, Select Previous to return to the edit page.

Once you select Continue, you will be automatically signed in to OpenInvoice.

- Name and Address

This information will appear on invoices.

Legal Company Name: Supplier Company2

Company Address 1: 1234 Test Street

Company Address 2:

Country: Canada

State/Prov/Other: Alberta

City: Calgary

Zip/Postal Code: T3G 5Z4

Main Phone: (403) 303-8441

- Contact Information

Email Address: adp-test2@live.ca

First Name: Mike

Last Name: Smith

User Name: mikesmith

<< Previous

Continue



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- Enter unique security question and answer.
- Select **'Submit'**.

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Security Question

The security question will be used by OpenInvoice to verify your identity should you forget your password.

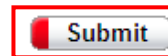
[Tips for Creating Security Questions](#)

Security Question:

Answer:

Verify Answer:

(these fields are case-sensitive and should have a minimum of 6 characters)



- Welcome message, Click **'Next'**.



[Help](#) [Sign Out](#)

OpenInvoice

> Home

Thu Jun 2 2011
Mike Smith, Supplier Company2

OpenInvoice™

Welcome to OpenInvoice.

This one time setup process will walk you through adding the required components that can be reused in the future when creating invoices through OpenInvoice.

Click **Next** to begin.



Setup at a Glance

- X Sites
- X Taxes
- X Products/Services
- X Users
- X User Assignment

The data you create now can be updated or added to at any time after this initial setup is complete.
You may contact the ADP On-Ramping support team at 1-866-627-3287 or by email at adponramping@adp.com.

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- Supplier site (location) setup. To set up additional locations, select 'Yes' and click 'Next'. If only one site (location) applicable, select No and click 'Next'.

- If selected 'Yes':
 - Enter Site (location) details (yellow fields are mandatory). Optionally select "same as" to copy details of alternate site address/set-up details.
- Select 'Submit'.

Corporate Sites

> Home > Corporate > Sites

Step 1 of 5: Sites

Creating unique or multiple sites allows you to separate access to invoices between users. We have already setup one site for you that is displayed at the bottom of this page.

Do you wish to set up an additional site? Yes No

Highlighted fields are mandatory.

Next >>

The data you create now can be updated or added to at any time after this initial setup is complete. You may contact the ADP On-Ramping support team at 1-866-627-3287 or by email at adponramping@adp.com.

Sites

Name	Type	Description	Address	Phone
Supplier Company2				
Calgary	Site		1234 Test Street, Calgary, AB CA	(403) 303-8441

Site Profile

- Site Details

Site Name: Red Deer

Site Details: Same as: --Please Select-- Enter manually

- Remit To Address

Pay-To Name:

Address 1: 4567 Test Street

Address 2:

City: Red Deer

Country: Canada

State/Prov/Other: Alberta

ZIP/Postal Code: T5Z 9P1

Enter a different Legal Address:

Enter a different Correspondence Address:

Validate For Payment: No

Submit **Cancel**

- Remit To Contact

First Name:

Last Name:

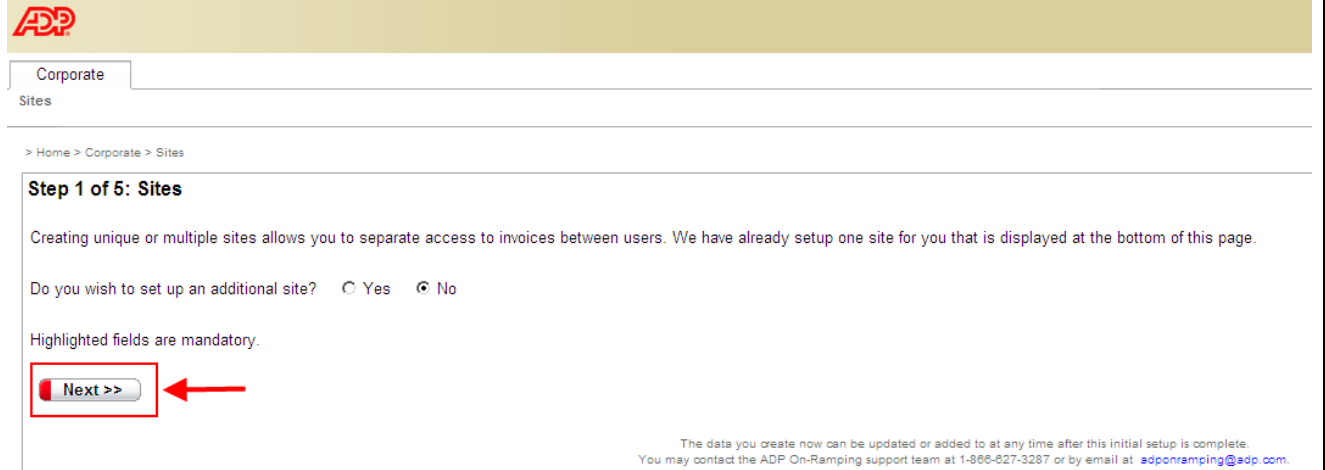
Contact Email:

Phone Number:

Supplier Self Registration Quick Reference Guide



- New site will appear in list. If finished adding sites (locations), click **'No'**, then **'Next'**. If would like to add additional, choose **'Yes'** and repeat steps above.



Corporate Sites

> Home > Corporate > Sites

Step 1 of 5: Sites

Creating unique or multiple sites allows you to separate access to invoices between users. We have already setup one site for you that is displayed at the bottom of this page.

Do you wish to set up an additional site? Yes No

Highlighted fields are mandatory.

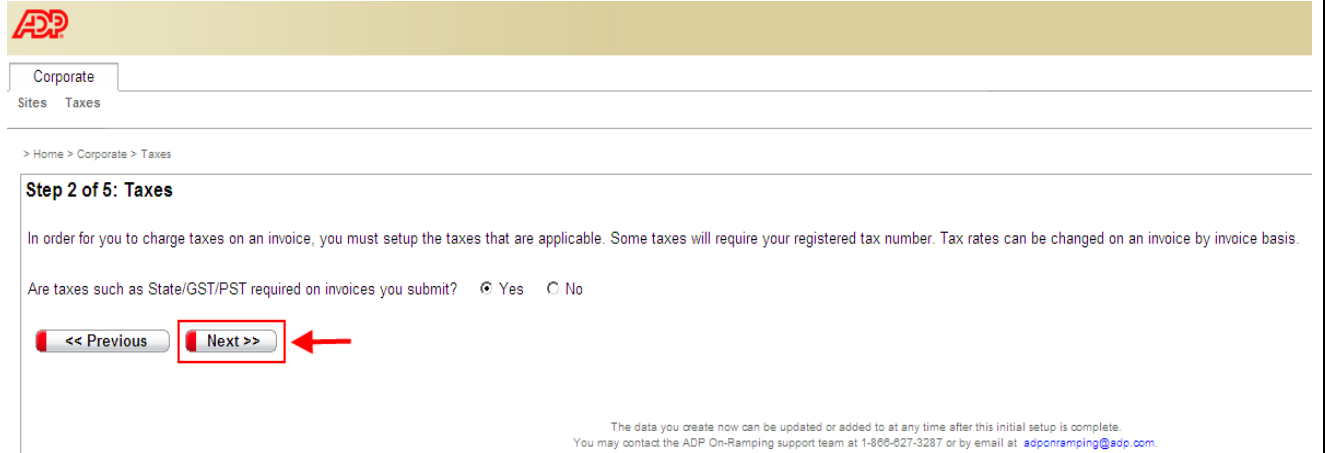
Next >> ←

The data you create now can be updated or added to at any time after this initial setup is complete. You may contact the ADP On-Ramping support team at 1-866-627-3287 or by email at adponramping@adp.com.

Sites

Name	Type	Description	Address	Phone
Supplier Company2				
Calgary	Site		1234 Test Street, Calgary, AB CA	(403) 303-8441
Red Deer	Site		4567 Test Street, Red Deer, AB CA	

- Set up taxes. Select **'Yes'**, then **'Next'**.



Corporate Sites Taxes

> Home > Corporate > Taxes

Step 2 of 5: Taxes

In order for you to charge taxes on an invoice, you must setup the taxes that are applicable. Some taxes will require your registered tax number. Tax rates can be changed on an invoice by invoice basis.

Are taxes such as State/GST/PST required on invoices you submit? Yes No

<< Previous **Next >>** ←

The data you create now can be updated or added to at any time after this initial setup is complete. You may contact the ADP On-Ramping support team at 1-866-627-3287 or by email at adponramping@adp.com.

Taxes

Enabled	Tax Name	Sites	Tax Number	Rate(%)
---------	----------	-------	------------	---------

0 records found.

Supplier Self Registration Quick Reference Guide



- Select country, applicable site(s).
- Click '**Enable Tax**'. Enter tax number.
- Select '**Submit**'.

Step 2 of 5: Taxes

Taxes require your registered tax number, and a default tax rate. For example, enter 5.0 for a 5% tax rate.

To remove a tax, blank out both the tax rate and tax number.

Tax rates can be changed on an invoice-by-invoice basis.

Locate the appropriate tax type in the list below, and enter your tax number if applicable and enter the default rate. You only need to enter information for taxes that you will use.

Click **Save** to save your changes without leaving the page.

Click **Submit** to save your changes and go back to the previous page.

Click **Cancel** to go back to the previous page without saving your changes.

<< Previous Next >>

The data you create now can be updated or added to at any time after this initial setup is complete. You may contact the ADP On-Ramping support team at 1-866-627-3287 or by email at adponramping@adp.com

Tax Configuration

Country:

Site:

Only selected taxes will be available when creating invoices.

Tax Name	Enable Tax
GST (Goods and Services Tax)	<input checked="" type="checkbox"/>
Tax Number	103498768
PST-BC (Provincial Sales Tax British Columbia)	<input type="checkbox"/>
PST-MB (Provincial Sales Tax Manitoba)	<input type="checkbox"/>
HST-NB (Harmonized Sales Tax New Brunswick)	<input type="checkbox"/>
HST-NF (Harmonized Sales Tax Newfoundland)	<input type="checkbox"/>
HST-NS (Harmonized Sales Tax Nova Scotia)	<input type="checkbox"/>
PST-ON (Provincial Sales Tax Ontario)	<input type="checkbox"/>
PST-PE (Provincial Sales Tax P.E.I.)	<input type="checkbox"/>
PST-QC (Provincial Sales Tax Quebec)	<input type="checkbox"/>
PST-SK (Provincial Sales Tax Saskatchewan)	<input type="checkbox"/>
HST-BC (Harmonized Sales Tax British Columbia)	<input type="checkbox"/>
HST-ON (Harmonized Sales Tax Ontario)	<input type="checkbox"/>

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- Tax information will appear, select No if no further information needed, then **'Next'**. If would like to add additional, choose **'Yes'** and repeat steps above.

- Set up products/services. This can be done individually or by template (help available by clicking on the [blue](#) hyperlink).

> Home > Corporate > Taxes

Step 2 of 5: Taxes

In order for you to charge taxes on an invoice, you must setup the taxes that are applicable. Some taxes will require your registered tax number. Tax rates can be changed on an invoice by invoice basis.

Do you wish to setup more/additional taxes? Yes No

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Next >>

The data you create now can be updated or added to at any time after this initial setup is complete. You may contact the ADP On-Ramping support team at 1-866-627-3287 or by email at adponramping@adp.com.

Taxes

Enabled	Tax Name	Sites	Tax Number	Rate(%)
✓	GST (Goods and Services Tax)	Calgary, Red Deer	103498768	5%

1 record found.



Corporate

Sites Taxes Products/
Services

> Home > Corporate > Products/Services

Step 3 of 5: Products/Services

Products/Services are the goods you rent or sell, services you provide to your customers and charge for including any third party charges. At least one product/service will need to be setup to begin creating invoices. The products/services will be selectable when you create your invoices.

How do you want to add products/services?

One by one

Copy & Paste [\(Help available\)](#)

<< Previous

Next >>

The data you create now can be updated or added to at any time after this initial setup is complete. You may contact the ADP On-Ramping support team at 1-866-627-3287 or by email at adponramping@adp.com.

Products/Services

Service Description	Service Code	Units	Unit Price
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0 records found.

Supplier Self Registration Quick Reference Guide



- Add One by One, enter details, select '**Submit**' or '**Add Another**'.

- Product/Services entered will appear in list. If would like to add additional, choose '**Yes**', choose type of entry and repeat steps above.

- If finished, select '**Next**'.

Step 3 of 5: Products/Services

Service Description (required) is the name or description of the product/service that will be available when creating invoices. **Service Code** is a unique identifier such as a part number used by your company to identify this specific item. **Units** are the Unit Of Measure for the Product/Service such as Hour, Each, Gallon, Kilometer. **Unit Price** is the default price for this product/service, this price can be updated or changed on an invoice.

Click **Submit** to save your changes and go back to the previous page.
Click **Add Another** to save your changes and add another product/service.
Click **Cancel** to go back to the previous page without saving your changes.

Highlighted fields are mandatory.

The data you create now can be updated or
You may contact the ADP On-Ramping support tea

Product/Service Profile

Description:
Code:
Units:
Unit Price:

> Home > Corporate > Products/Services

Step 3 of 5: Products/Services

Products/Services are the goods you rent or sell, services you provide to your customers and charge for including any third party charges. At least one product/service will need to be setup to begin creating invoices. The products/services will be selectable when you create your invoices.

Do you wish to add more products/services? Yes No
How do you want to add products/services? One by one Copy & Paste [\(Help available\)](#)

The data you create now can be updated or added to at any time after
You may contact the ADP On-Ramping support team at 1-866-627-3287 or by

Products/Services

Service Description	Service Code	Units	Unit Price
Labour	1234567	DAY	250.00

1 record found.

Supplier Self Registration Quick Reference Guide



- Add other users. Choose 'Yes' to add, choose 'No' and 'Next' if finished.

> Home > Membership > Users

Step 4 of 5: Users

Users can be added if you require that additional people in your company sign in to create or view invoices, or administer your ADP Company.

A user account has already been created for you based on the information you provided in the initial registration (see below).

Do you wish to add additional users? Yes No

The data you create now can be updated or added to at any time.
You may contact the ADP On-Ramping support team at 1-866-627-3100.

Users

Last Name	First Name	Username	Email	Phone
Smith	Mike	mikesmith	adp-test2@live.ca	(403) 303-8441

1 record found.

Supplier Self Registration Quick Reference Guide



- If selected 'Yes':
 - Enter employee details (yellow fields are mandatory). Choose 'Submit' if finished or 'Add Another'.

- The new record will appear in the list, if finished adding, select 'No' and then 'Next' to continue.

> Home > Membership > Users > User Profile

Step 4 of 5: Users

Please provide a username, password, first name, last name, email address and phone number for the new user.

Username must not already exist within the ADP system.

Password password is temporary - each user will be asked to change it the first time they login.

Username and Password are both case sensitive.

Click **Submit** to save your changes and go back to the previous page.

Click **Add Another** to save your changes and add another user.

Click **Cancel** to go back to the previous page without saving your changes.

Highlighted fields are mandatory.

<< Previous Next >>

The data you create now can't
You may contact the ADP On-Rampin

User Profile

Username: donsmith
Password:
Verify Password:
First Name: Don
Last Name: Smith
Initial:
Email: don.smith@supplier2.com
Phone:

Password must be at least 8 characters long and contain:

- at least one upper case character

- at least one lower case character

- at least one number

Password cannot include:

- more than 3 consecutive repeated characters ('aaaa' or '1111')

- more than 2 consecutive characters ('abc' or '123')

- more than 3 consecutive characters from your username

- the word 'password' ('Apassword1')

Submit Add Another Cancel

> Home > Membership > Users

Step 4 of 5: Users

Users can be added if you require that additional people in your company sign in to create or view invoices, or administer your ADP Company.

A user account has already been created for you based on the information you provided in the initial registration (see below).

Do you wish to add additional users? Yes No

<< Previous Next >>

The data you create now can be updated or added to at any ti
You may contact the ADP On-Ramping support team at 1-866-627-32

Users

Last Name	First Name	Username	Email	Phone
Smith	Don	donsmith	don.smith@supplier2.com	
Smith	Mike	mikesmith	adp-test2@live.ca	(403) 303-8441

2 records found.

Supplier Self Registration Quick Reference Guide



- Assign users to Sites (locations). Select **'Yes'** to modify setting or **'No'** and **'Next'** to continue.

- If modification needed, choose site (location) that you would like user to view.
- When complete, select **'Submit'**.

> Home > Membership > Users

Step 5 of 5: User Assignment

The users you created have been automatically assigned to all sites. You can remove a user from a specific site to remove their ability to create invoices for that site.

Do you wish to modify this setting? Yes No

The data you create now can be updated or added to at any time after this initial setup is complete. You may contact the ADP On-Ramping support team at 1-866-627-3287 or by email at adponramping@adp.com.

User Assignment

	Don Smith	Mike Smith
Supplier Company2		
Calgary	✓	✓
Red Deer	✓	✓

> Home > Membership > Users > User Assignment

Step 5 of 5: User Assignment

Please assign users to sites they belong to by selecting the appropriate checkbox(es). Information entered can be updated at the end of the registration process.

Click **Submit** to save your changes and go back to the previous page.

Click **Cancel** to go back to the previous page without saving your changes.

The data you create now can be updated or added to at any time after this initial setup. You may contact the ADP On-Ramping support team at 1-866-627-3287 or by email at adpor.

User Assignment

	Don Smith	Mike Smith
Supplier Company2		
Calgary	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Red Deer	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Supplier Self Registration Quick Reference Guide



- Supplier's registration is complete!

- Email will be sent to ADP or Buyer Contact to alert status of supplier registration.



Home

Corporate

Membership

> Home

OpenInvoice™

Your registration is complete! Thank you.

Before you can start creating invoices, your invoices information must be verified and your company must be activated for transactions. A representative will contact you as soon as possible.

Please bookmark login page by clicking this [link](#) for access to OpenInvoice in the future.

If you have any questions, please contact us at adpinvoicesupport@adp.com.

OpenInvoice On-Ramping Event for 'Supplier Company2': Self Registration Complete

ADP On-Ramping [docptest@adp.com]

Sent: Thu 6/2/2011 11:52 AM

To:

This e-mail has been automatically generated by ADP to alert you to changes to your on-ramping requests.

The following request has completed self registration:

Buyer Name: Michelle's Buyer Company

Status: In Progress

Requested: 06/02/2011 11:28:38 MDT

Emailed: 06/02/2011 11:29:05 MDT

Registered: 06/02/2011 11:33:43 MDT

Data Setup: 06/02/2011 11:51:37 MDT

Verified:

Enabled:

Supplier Name: Supplier Company2

Registered Company: Supplier Company2

Address 1: 1234 Test Street

Address 2:

City: Calgary

State/Province/County: AB

Country: CA

Postal: T3G 5Z4

Contact Details

First Name: Mike

Last Name: Smith

Email: adp-test2@live.ca

Phone: (403) 303-8441

If you have any questions, contact docptest@adp.com or call our support line at 1-866-627-3287.

Supplier Self Registration Quick Reference Guide



- Email alert will be sent to supplier upon completion.

NEXT STEPS

- Upon completion of the Supplier Self Registration, ADP support team will verify supplier and alert Buyer to enable the supplier.
- Once Supplier has completed self registration, is verified by ADP, and training is scheduled/completed, the buyer will **enable** the supplier company to transact electronically.

OpenInvoice Registration Complete for Supplier Company2

[Back to messages](#) |

To adp-test2@live.ca [Add to contacts](#)

11:51 AM
[Reply](#)

Attachments, pictures and links in this message have been blocked for your safety.
[Show content](#) | [Always show content from michelle_hinrichs@adp.com](#)

Dear Mike,

Thank you for registering and setting up your company profile on OpenInvoice.

We are in the process of verifying your company information. Once completed, a representative will contact you if training is required.

If you have any questions, contact docptest@adp.com or call our support line at 1-866-627-3287.

For more information about ADP, our products and our customers, go to <http://www.adp.com/solutions/employer-services/adp-accounts-payable-solution.aspx>

We look forward to working with you in the future.

Sincerely,
The ADP Service Delivery Team.

This e-mail is intended only for the named addressee. If you have received this message in error, please notify ADP and delete the original message. Thank you.

This message and any attachments are intended only for the use of the addressee and may contain information that is privileged and confidential. If the reader of the message is not the intended recipient or an authorized representative of the intended recipient, you are hereby notified that any dissemination of this communication is strictly prohibited. If you have received this communication in error, notify the sender immediately by return email and delete the message and any attachments from your system.

Supplier Self Registration Quick Reference Guide



Notes: