



# The Vault by Interchange Recycling

## **Training Manual**

**Interchange**  
Recycling

January 2025

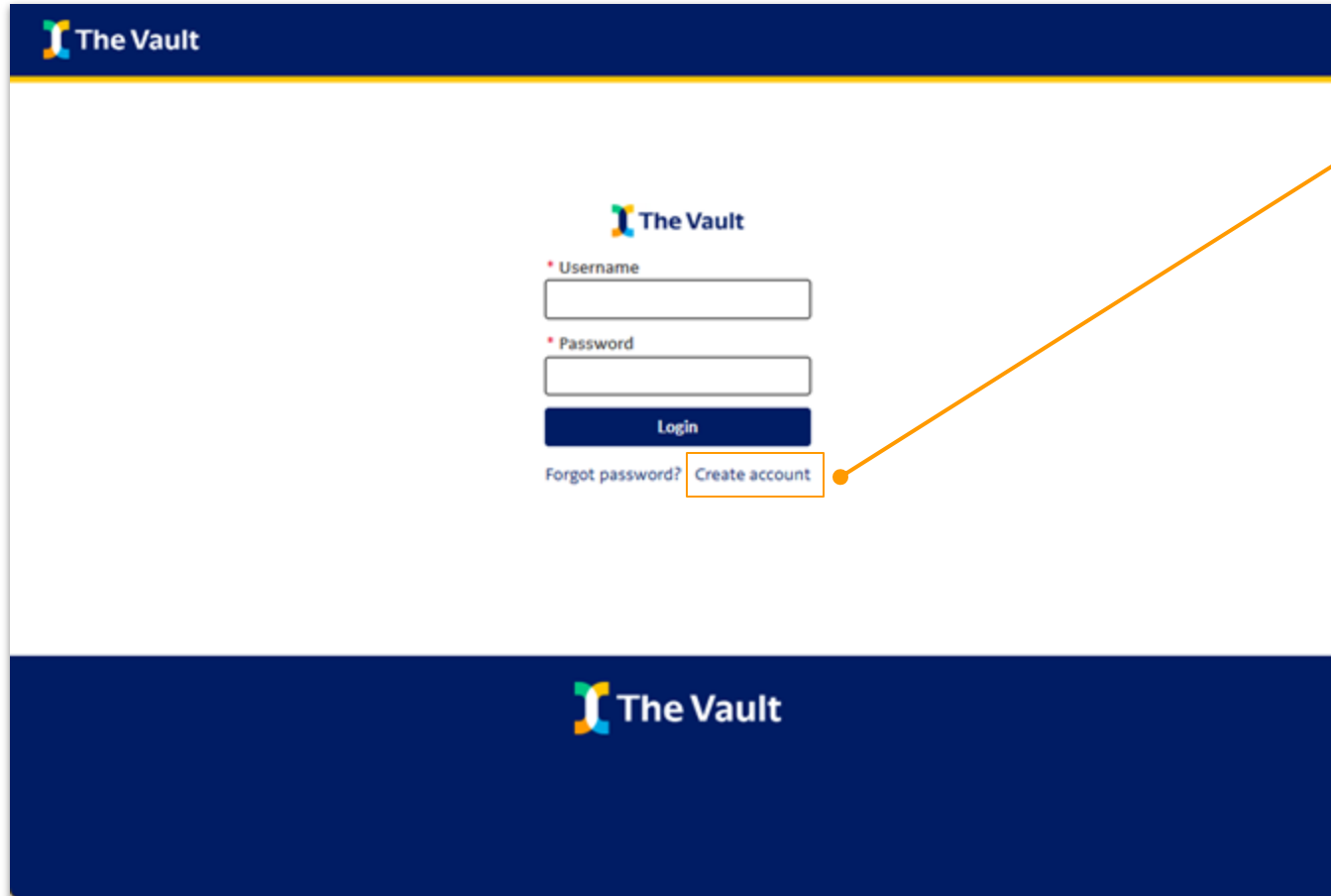
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# Account Creation

When a new Member seeks to register with Interchange Recycling the first step is to create an Account in The Vault. This is a one-time step for users of The Vault.

# Account Creation: Login Page



The screenshot shows the login page for 'The Vault'. At the top left, there is a logo for 'The Vault' consisting of a stylized 'I' made of four colored segments (green, yellow, blue, red) followed by the text 'The Vault'. Below this, the page content is centered and includes another 'The Vault' logo. Underneath the logo are two input fields: the first is labeled 'Username' with a red asterisk, and the second is labeled 'Password' with a red asterisk. Below these fields is a dark blue button with the text 'Login'. At the bottom of the form area, there are two links: 'Forgot password?' and 'Create account'. The 'Create account' link is highlighted with a yellow border, and an orange arrow points from it to the right towards the text 'Create an Account:'. The page has a dark blue header and footer, both containing the 'The Vault' logo.

## Create an Account:

Navigate to The Vault login page and click "Create account".

# Overview of the **Account Creation** Process

Once an individual associated with a Member organization (“user”) selects the “Create account” button, there are four steps associated with signing up for an Account in The Vault:



**Step 1** User first enters a unique identifier to make sure that the Account is not already registered in The Vault.

If an existing account is found, the user is prompted to log in.

**Step 2** Enter information pertinent to the organization, e.g., legal business name and address.

**Step 3** Contact information is collected about the user creating the Account.

This user will automatically become the Account Administrator and thereby have control over adding other users, enrolling for new programs, etc. (this can be changed once logged in to The Vault. [Refer to Managed Users](#)).

**Step 4** Before an Account is created, the user can review the entered information for accuracy and make any necessary changes.

# Account Creation: Business Number

User enters a unique identifier to make sure that the Account is not already registered in The Vault. If an existing account is found, the user is prompted to log in using their existing credentials.

The Vault logo is in the top left. A navigation sidebar on the left has four items: 'Business Number' (selected), 'Business', 'Contact', and 'Summary'. The main heading is 'Start Registration by entering your business number'. Below it, there are three paragraphs of text explaining the registration process. At the bottom, there are two input fields: 'Corporate Registration Number' and 'Business License Number', separated by 'OR'. A 'Cancel' button is on the left and a 'Next' button is on the right.

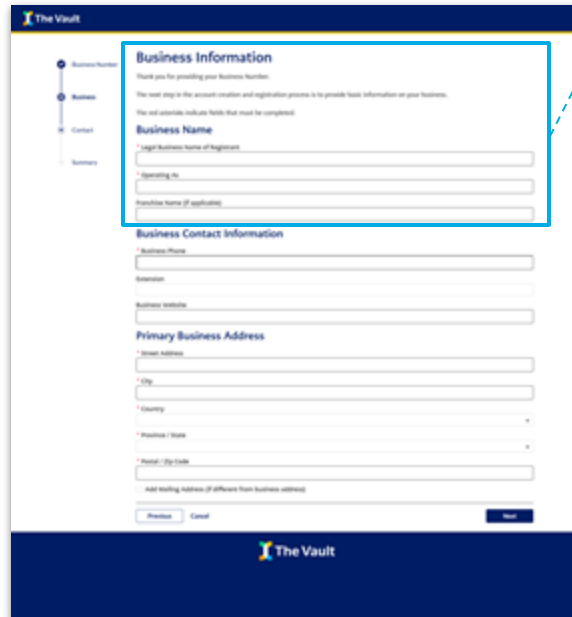
**Enter a Business Number:**  
Enter a Corporate Business Registration Number or a Business License Number.

**Duplicate Account:**  
If an account already exists in The Vault, an error message will prompt the user to sign in.

This is a close-up of the 'Corporate Registration Number' input field. The field contains the value '11222'. Below the field, a red error message is displayed: 'An account with this Corporate Registration Number already exists, please sign in with that account or contact us for support.' Below the error message, there are 'OR' and 'Business License Number' input fields, and 'Cancel' and 'Next' buttons at the bottom.

# Account Creation: Business Information

Enter information pertinent to the Member organization, e.g., legal business name, contact information, and address.



The screenshot shows the 'Business Information' form in 'The Vault' system. The form is divided into sections: 'Business Information', 'Business Contact Information', and 'Primary Business Address'. The 'Business Information' section contains three input fields: 'Legal Business Name of Registrant', 'Operating As', and 'Franchise Name (if applicable)'. The first two fields have red asterisks next to their labels, indicating they are mandatory. The 'Business Contact Information' section includes fields for 'Business Phone', 'Extension', and 'Business Website'. The 'Primary Business Address' section includes fields for 'Street Address', 'City', 'Country', 'Province / State', and 'Postal / Zip Code', along with a checkbox for 'Add mailing address (if different from business address)'. A 'Next' button is located at the bottom right of the form.

## Business Information

Thank you for providing your Business Number.

The next step in the account creation and registration process is to provide basic information on your business.

The red asterisks indicate fields that must be completed.

### Business Name

\* Legal Business Name of Registrant

\* Operating As

Franchise Name (if applicable)

**Mandatory Fields:** These fields that must be filled out by the user in order to proceed to the next page.

# Account Creation: Business Information

Enter information pertinent to the organization, e.g., legal business name, contact information, and address.

The screenshot shows a web form titled 'Business Information' with a progress indicator on the left. The form is divided into sections: 'Business Name', 'Business Contact Information', and 'Primary Business Address'. The 'Business Contact Information' section is highlighted with a yellow box. It contains three input fields: 'Business Phone', 'Extension', and 'Business Website'. The 'Primary Business Address' section contains several input fields for street address, city, country, province/state, and postal/city code, along with a checkbox for 'Add mailing address if different from business address'. At the bottom of the form are 'Previous', 'Cancel', and 'Next' buttons.

## Business Contact Information

\* Business Phone

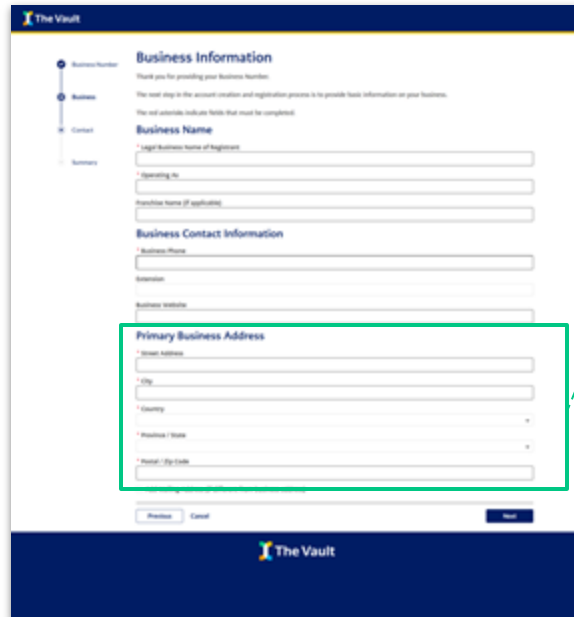
Extension

Business Website



# Account Creation: Business Information

Enter information pertinent to the organization, e.g., legal business name, contact information, and address.



The screenshot shows the 'Business Information' form in 'The Vault' system. The form is divided into several sections: 'Business Name', 'Business Contact Information', and 'Primary Business Address'. The 'Primary Business Address' section is highlighted with a green dashed box. The form includes fields for Street Address, City, Country, Province / State, and Postal / Zip Code. There is also a checkbox for 'Add Mailing Address (if different from business address)'. The form has 'Previous', 'Cancel', and 'Next' buttons at the bottom.



**Primary Business Address**

- \* Street Address
- \* City
- \* Country
- \* Province / State
- \* Postal / Zip Code

Add Mailing Address (if different from business address)

Previous Cancel Next

**Mailing Address:** If the mailing address differs from the primary business address, the user can select the 'Add Mailing Address' checkbox and enter the new primary mailing address.

# Account Creation: Contact Information

Contact information is collected about the specific user creating the Account.

The screenshot shows the 'The Vault' account creation interface. The 'Contact Information for your business' section is highlighted with an orange dashed box. This section includes fields for Name (First Name, Last Name, Title/Position) and Department (Finance, Operations, Administration, Marketing, Environmental/Sustainability). Below this is the 'Contact Information' section, which includes fields for Email, Phone Number, and Extension. The 'Next' button is visible at the bottom right of the form.

## Contact Information for your business

Please provide the name and contact information for the primary contact in your organization for the Interchange Recycling program.

The red asterisks indicate fields that must be completed.

### Name

\* First Name

\* Last Name

\* Title/Position

\* Department

- Finance
- Operations
- Administration
- Marketing
- Environmental/Sustainability

**Departments:** Multiple departments can be selected. These are used to define what emails/notifications a user receives (see: [Communications](#)).

# Account Creation: Contact Information

The email address entered must be connected to an inbox that can accept inbound message (i.e., not a “noreply” email) given that a verification email code will be sent to this address.

**Contact Information for your business**

Please provide the name and contact information for the primary contact in your organization for the interchange recycling program.

The red asterisks indicate fields that must be completed.

**Name**

\* First Name  
\* Last Name  
\* Title/Position

\* Department  
Finance  
Operations  
Administration  
Marketing  
Accounting/Accountability

**Contact Information**

A link will be sent to the email you provide to complete your registration.

\* Email (This will be your username)  
\* Phone Number  
Extension  
Secondary Phone Number

Previous Cancel Next

## Contact Information

A link will be sent to the email you provide to complete your registration

\* Email (This will be your username)

\* Phone Number

Extension

Secondary Phone Number

Previous

Cancel

Next

# Account Creation: Summary

Before an Account is created, you can review all the information you have entered on a single page for accuracy and make any necessary changes.

The screenshot shows the 'Summary' page of 'The Vault' account creation process. The page is divided into sections: Business Information, Business Contact Information, Business Address, Profile and Contact Information, and Contact Information. A checkbox at the bottom of the form is checked, indicating agreement to the Terms & Conditions. The 'Save' button is visible at the bottom right of the form.

**Business Information**  
Please review the information below to correct before creating your account.  
Business Number  
Corporate Registration Number: 2342342342  
Business Name  
Legal Business Name of Registrant: EcoLuxe  
Operating As: EcoLuxe  
Franchise Name (if applicable)

**Business Contact Information**  
Business Phone: 6133839438  
Extension: 11  
Business Website: www.ecoluxe.com

**Business Address**  
Street Address: 301 Pine St  
City: Victoria  
Country: Canada  
Province / State: British Columbia  
Postal / Zip Code: V2M1A3

**Profile and Contact Information**  
Name  
First Name: Lucy  
Last Name: Smith  
Title/Position: Director  
Department: Finance

**Contact Information**  
Email (This will be your username): carandra.l.smith-hug@vat.com  
Phone Number: 6133442029  
Extension: 11  
Secondary Phone Number:

I confirm that I have the authority to register my organization for The Vault and that the information provided above is accurate.

Previous Cancel Save

## Attestation:

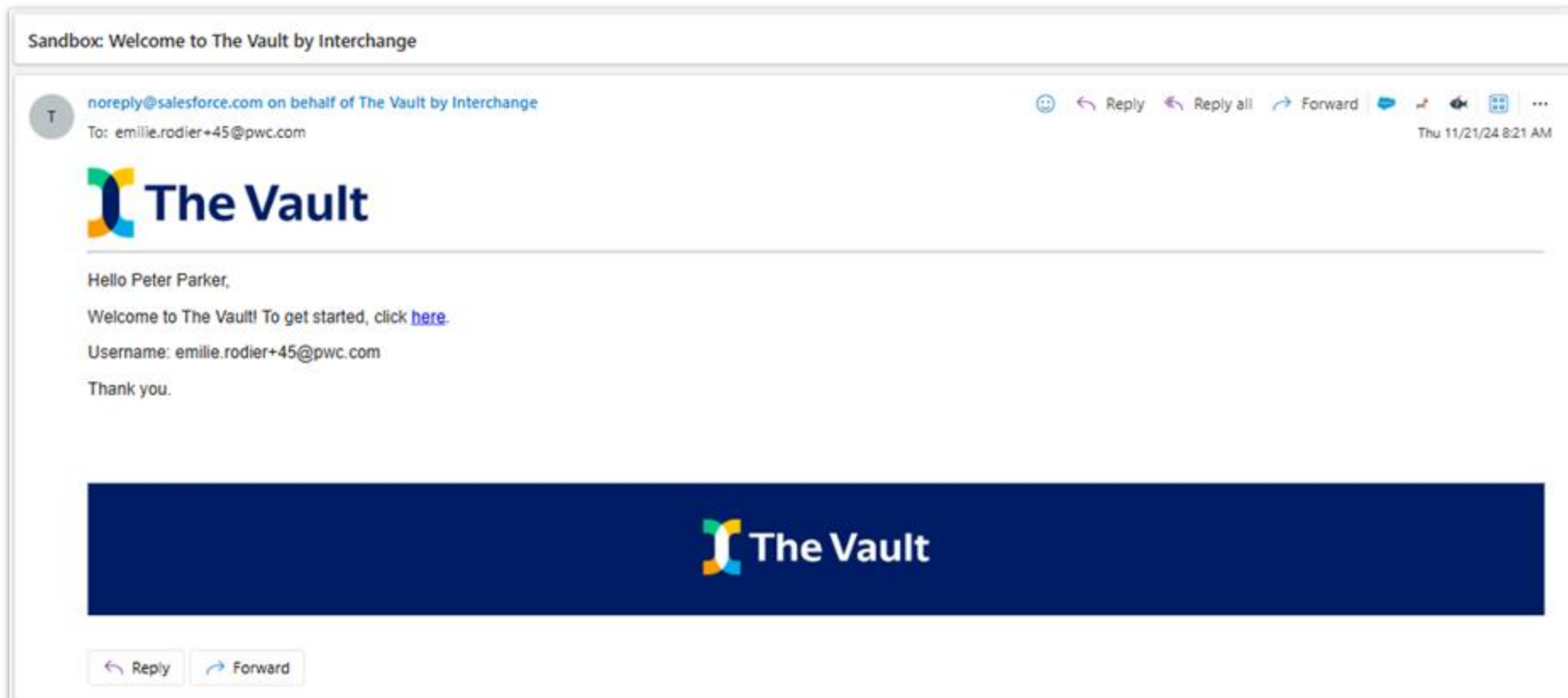
User must agree to the Terms & Conditions (by selecting this checkbox) to create an Account.

# Setting a New Password

After creating an Account in The Vault, the User will receive a system generated email to set a password that they will use, along with their email address, to access The Vault.

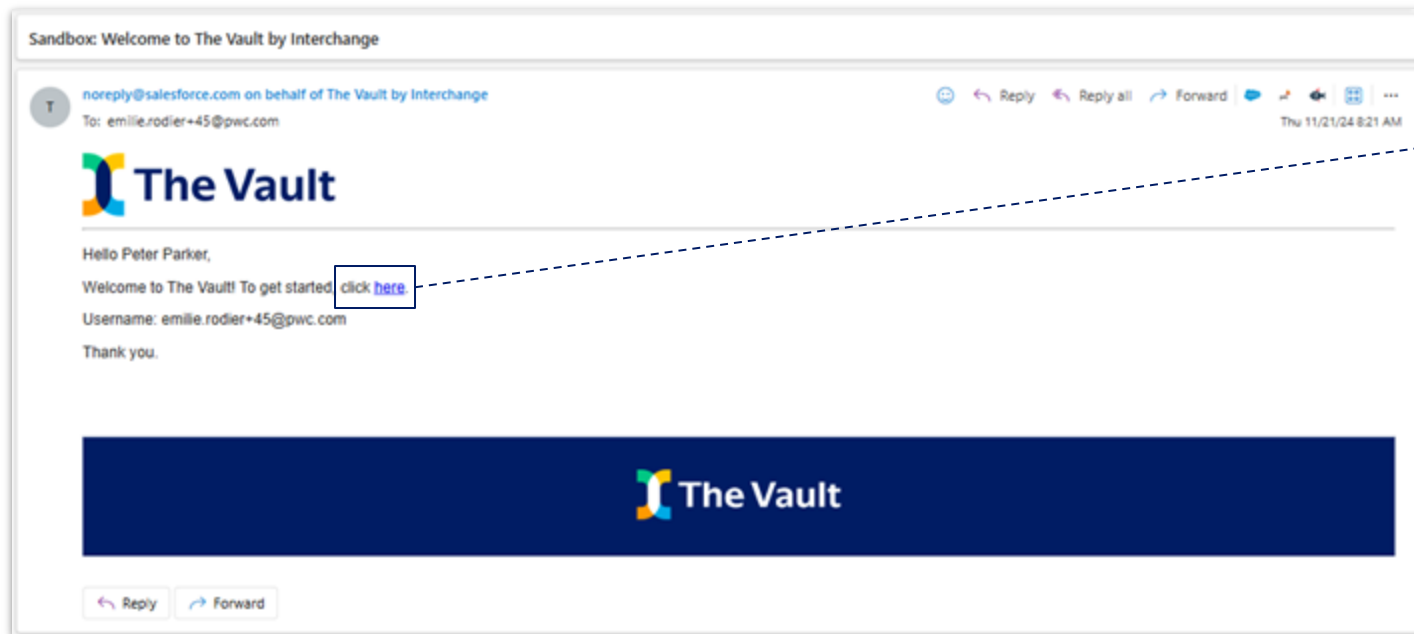
# Setting a New Password: **Welcome Email**

Once an account has been created, the user will receive an email directing them to click a link to complete their registration.



# Setting a New Password: **Setting a Password**

Upon clicking on the email link, Users will be redirected to the password change page and prompted to set their new password.



### Change Your Password

Enter a new password for **emilie.rodier+45@pwc.com**.  
Make sure to Include at least:

- 8 characters
- 1 letter
- 1 number

\* New Password

\* Confirm New Password

Change Password

Password was last changed on 11/21/2024, 4:21 PM.

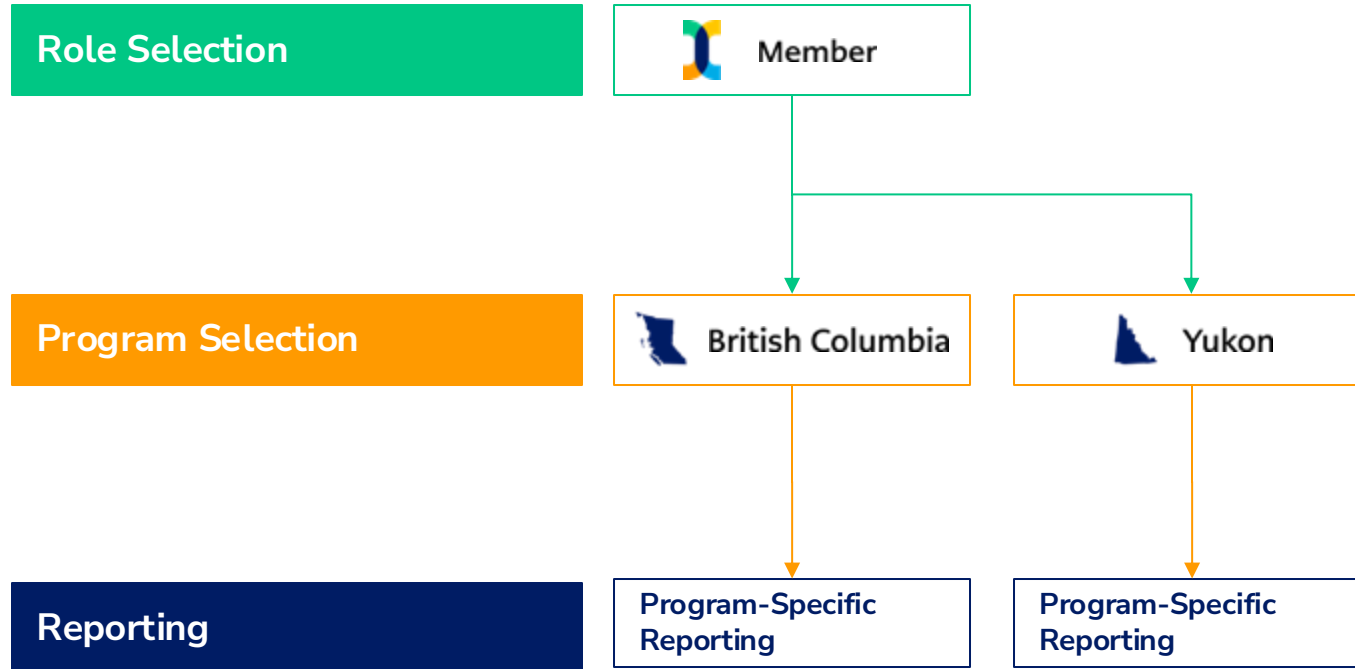
# Role and Program Selection

Once logged in, the user needs to select their Role (Member) and the Program they want to register for (e.g., British Columbia and/or Yukon).



# Role & Program Selection

After creating your Account, you will select Member as your role. This selection impacts what program(s) are subsequently available for registration.



## Roles:

- Defines what program(s) an Account can be registered for

## Programs:

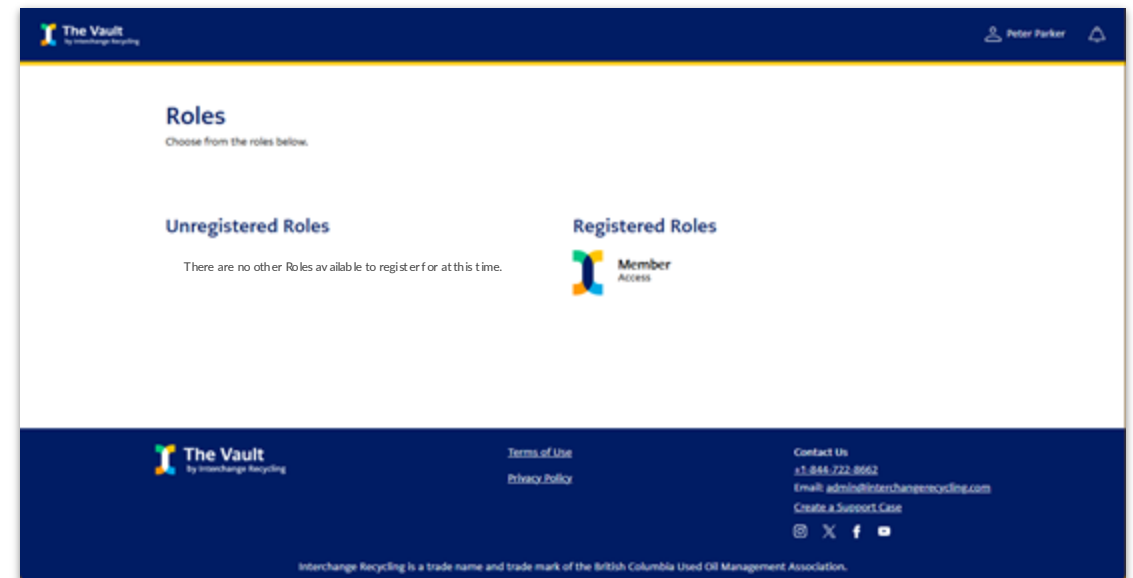
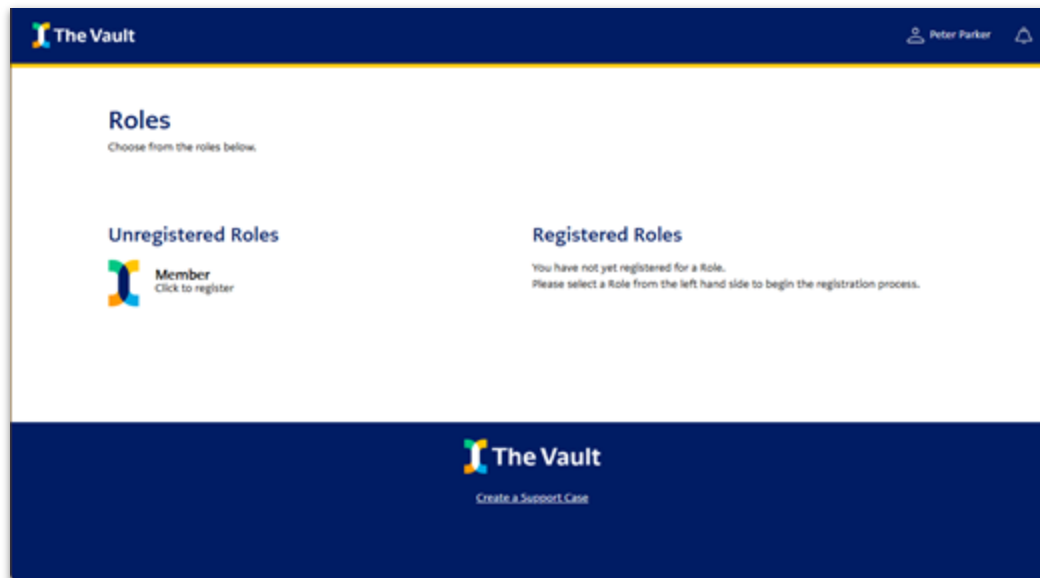
- Allows for different pricing, products, etc. per jurisdiction
- An Account can be registered for more than one program

## Reporting:

- Reporting requirements can be unique per program

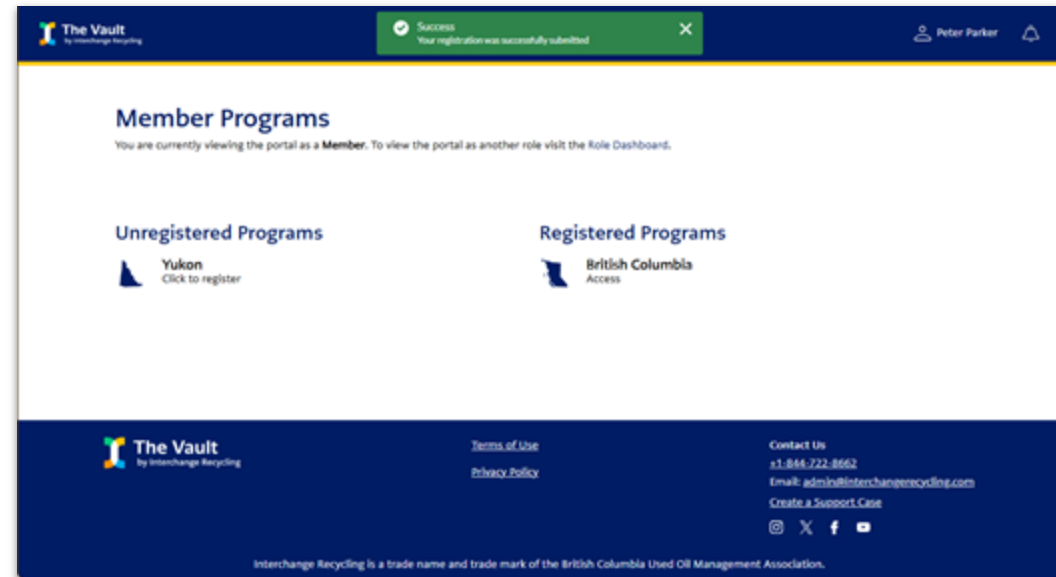
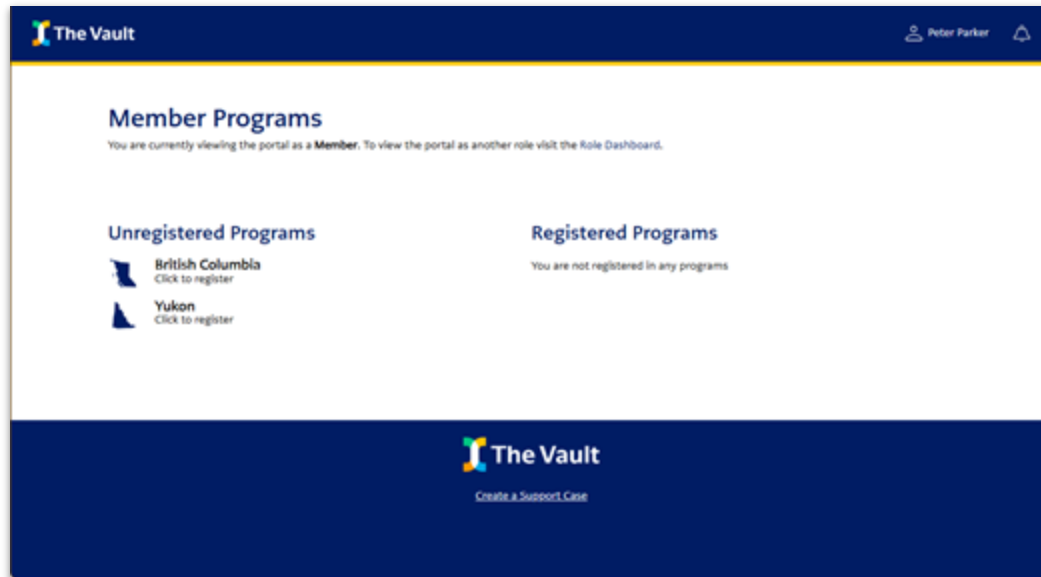
# Role Selection

Once an Account has been created and a password successfully set, the user will be able to log into The Vault and is directed to the Role Selection page. This page shows the Roles that the user's Member organization is eligible to register for (*Unregistered Roles*) and those that the Member Organization is actively registered for (*Registered Roles*).



# Program Selection

Once registered for a Role, the applicable Programs for that Role and Member organization are displayed on the Program Selection page. Programs the Member organization has not yet registered for are displayed (*Unregistered Programs*) and the Programs that the Member organization is actively registered in (*Registered Programs*).



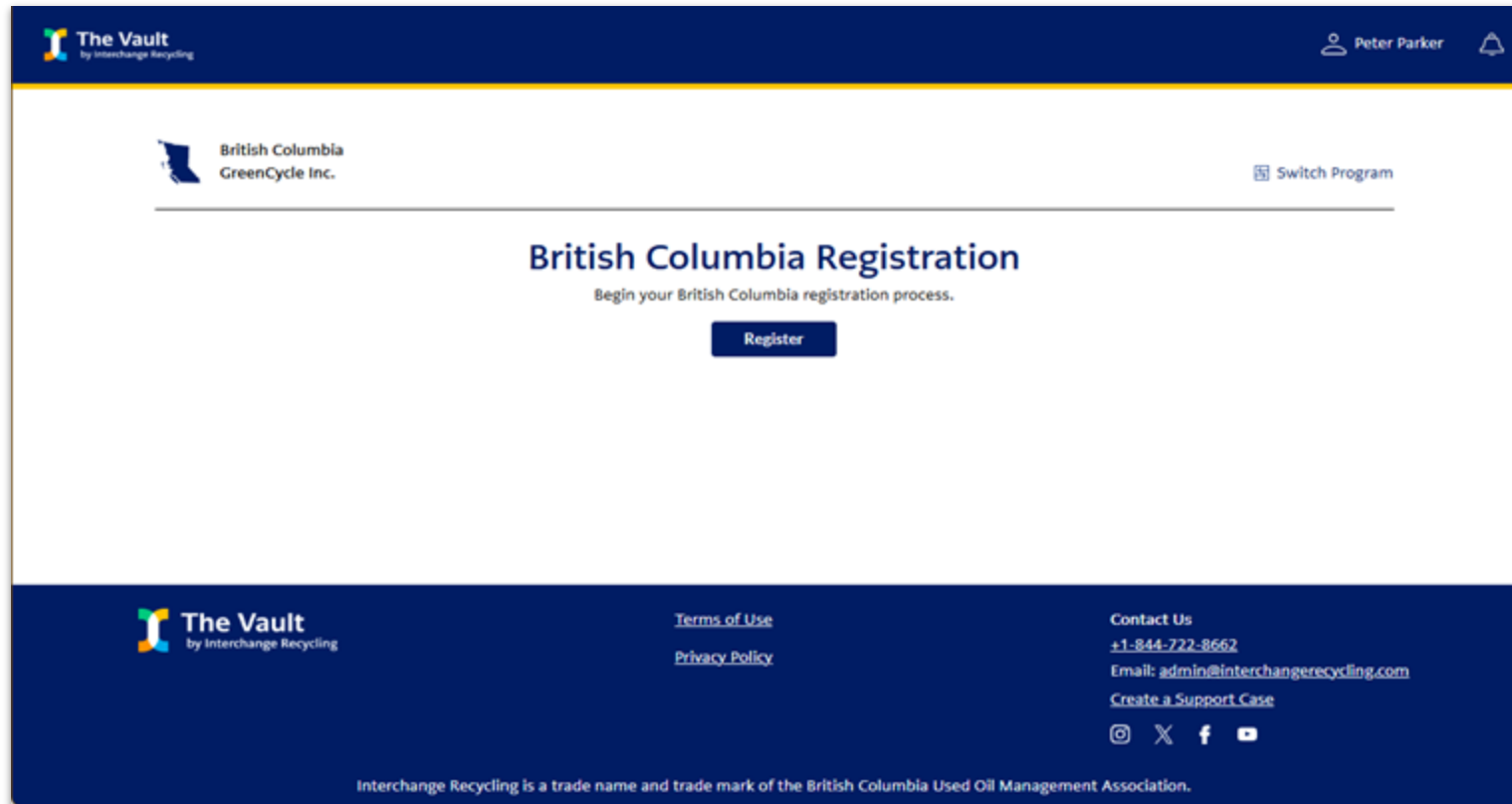
If a Member is registered in only one Program, they will be automatically directed to their homepage upon logging in.  
If a Member is registered more than one Program, Users logging into The Vault will be directed the *Program Selection Page* where they will pick the program they want to view.

# Program Registration

Once the user has selected the role of the Member organization, they will be prompted to register for an applicable Program. Member organizations that operate in both British Columbia and the Yukon will need to register in both Programs.

# Program Registration

To begin registration in a specific Program, the user confirms their intention and selects “Register”.



# Program Registration: Typical Flow

Once a user selects “Register”, there are five steps associated with completing a Program Registration in The Vault.



**Step 1** Provide additional program- specific business information of your organization, such as any additional locations of operations, your first supply date and the amount of approximate annual sales of eligible materials.

**Step 2** Indicate if your organization works with any other companies that supply you with program eligible materials

You can also indicate if your organization pays environmental fees to your Suppliers and can upload any supporting documentation for these relationship(s).

**Step 3** Add any reseller Customer information and upload any applicable supporting documentation for these relationship(s) if your organization sells Program Eligible Material to end users and resellers.

**Step 4** Optional upload for any other additional relevant documentation to their registration.

**Step 5** Review the entered information for accuracy, go back to a section to make changes, and confirm the terms and conditions when ready to proceed with the program registration.

# Program Registration: Business Information

Enter information pertinent to your organization, e.g., business start date, primary line of business.

The screenshot shows a web application interface for 'The Vault' with a navigation menu on the left. The main content area is titled 'Business Information' and contains several sections: 'Business Information' (with fields for legal name, phone, operating as, address, website, start date, and primary/secondary business descriptions), 'Additional Locations' (with a table for location details), and 'Program Eligible Materials' (with a date field and a list of materials). A 'Save Draft' button is visible at the bottom of the form.

## Business Information

Please provide the following information for your business in the context of the province you selected

Legal Business Name:  
GreenCycle Inc.

Business Phone:  
(416) 222-0000

Operating As:  
GreenCycle Inc.

Business Address:  
900 Main Street  
Victoria, British Columbia  
V1A1A1, CA

Website:  
greencycle.com

\* Business Start Date

\* Locations of Customers (select all that apply)

- In Province/Territory  
 Outside Province/Territory

\* Select one description that best describes the company's primary line of business

Select all descriptions that best describe the company's secondary line(s) of business

- Distributor  
 Importer  
 Manufacturer  
 Online Seller  
 Original Equipment Manufacturers (OEM)  
 Retailer  
 Wholesaler  
 Other

# Program Registration: **Additional Locations**

Enter any additional location(s) your organization operates within the jurisdiction you are registering into (e.g, the Yukon).

**Business Information**

Please provide the following information for your business in the context of the province you selected.

**Additional Locations**

Please list out all additional locations for the company in the province.

Location Name	Address	Phone Number	Manage
Click Add Location to add to this table			

**Add Location**

## Add a Location:

For each additional location added, the user will be prompted to enter: the Location Name, Street Address, and Phone Number.

**Add a Location**

\* Location Name

\* Phone

\* Street Address

\* City

\* Country

\* Province/State

\* Postal/Zip Code

**Cancel** **Save**



# Program Registration: Program Eligible Materials

Enter the volume your organization sells/supplies annually for all Program Eligible Materials. This supports Interchange Recycling identify approximate amounts of products to expect per annum.

**Business Information**

Please provide the following information for your business in the context of the position you selected

**Business Name:** [Text Field] **Business Phone:** [Text Field]

**Account:** [Text Field] **Business Address:** [Text Field]

**Operating As:** [Text Field] **Website:** [Text Field]

**Business Start Date:** [Date Picker]

**Locations of Customers (select all that apply):** [List Box]

**Primary Product Description:** [Text Field]

**Secondary Product Descriptions:** [List Box]

**Additional locations:** [Table with columns: Location Name, Address, Phone Number, Manage]

**Program Eligible Materials**

\* Date of first sale/supply in or into the province/territory: [Date Picker]

Please enter an approximate number of products sold/supplied per year for the following options. If you do not sell/supply this product please enter 0 where applicable

- \* Oils: [Text Field]
- \* Filters: [Text Field]
- \* Oil Containers: [Text Field]
- \* Antifreeze/Glycols: [Text Field]
- \* Antifreeze/Glycol Containers: [Text Field]

Buttons: Cancel, Save Draft, Next

## Program Eligible Materials

\* Date of first sale/supply in or into the province/territory

[Date Picker]

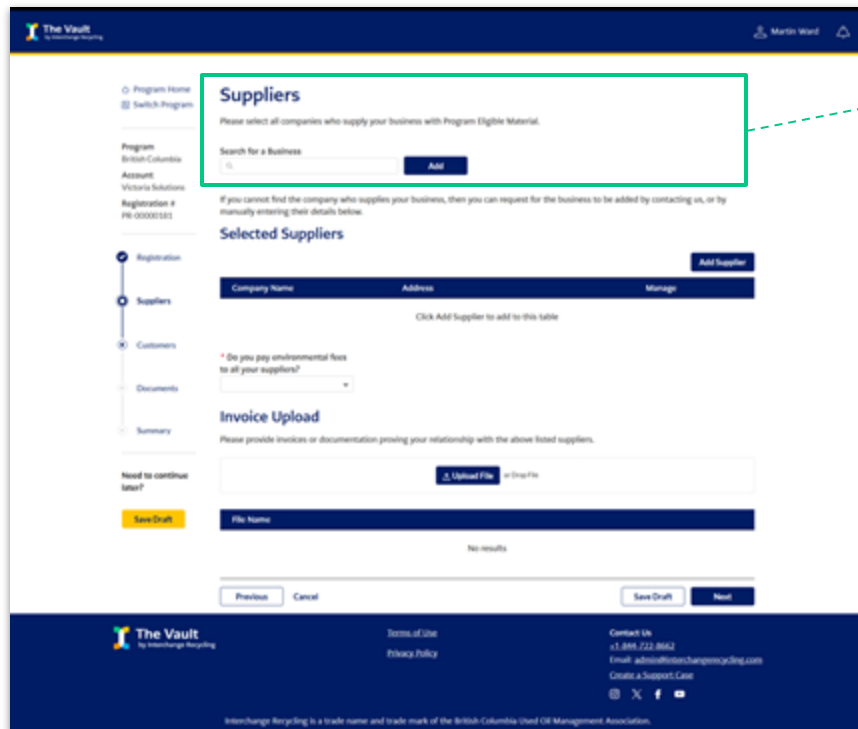
Please enter an approximate number of products sold/supplied per year for the following options. If you do not sell/supply this product please enter 0 where applicable

- \* Oils
- \* Filters
- \* Oil Containers
- \* Antifreeze/Glycols
- \* Antifreeze/Glycol Containers

Buttons: Cancel, Save Draft, Next

# Program Registration: Suppliers

Enter the details of all companies that supply your organization with Program Eligible Materials. This supports Interchange Recycling with understanding a Member's position in a supply chain.



The screenshot shows the 'Suppliers' registration page in The Vault. The page is titled 'Suppliers' and includes a search bar with the text 'Search for a Business' and an 'Add' button. Below the search bar, there is a section for 'Selected Suppliers' with a table header containing 'Company Name', 'Address', and 'Manage'. The table is currently empty, with a message 'Click Add Supplier to add to this table'. There is also an 'Add Supplier' button. The page includes a sidebar with navigation options like 'Program Home', 'Switch Program', 'Program', 'Account', 'Registration', 'Suppliers', 'Customers', 'Documents', and 'Summary'. At the bottom, there is a footer with 'The Vault' logo, 'Terms of Use', 'Privacy Policy', and contact information.

## Suppliers

Please select all companies who supply your business with Program Eligible Material.

Search for a Business



Add

The search functionality allows users to search for and select any Supplier already registered in The Vault and add them to their Suppliers List.

# Program Registration: Suppliers

If the Supplier does not already exist within The Vault, the user can manually enter in their details.

The screenshot shows the 'Suppliers' page in The Vault. The page has a sidebar with navigation options: Program Home, Switch Program, Program (British Columbia), Account (Victoria Solutions), Registration # (PR-00000155), Registration, Suppliers, Customers, Documents, and Summary. The main content area is titled 'Suppliers' and includes a search bar for businesses, a table for 'Selected Suppliers', and an 'Add Supplier' button. A yellow box highlights the 'Add Supplier' button and the 'Selected Suppliers' table. A green box highlights the 'Add Supplier' button in the 'Add a Supplier' form.

If you cannot find the company who supplies your business, then you can request for the business to be added by contacting us, or by manually entering their details below.

## Selected Suppliers

Company Name	Address	Manage
--------------	---------	--------

Click Add Supplier to add to this table

Add Supplier

## Add a Supplier

\* Company Name  Contact Name

\* Phone  Email

\* Street Address  \* City

\* Country  \* Province/State  \* Postal/Zip Code

Cancel

### Add a Supplier:

For each supplier, the user will be prompted to enter the: Company Name, Address, Contact Name, and Email.

# Program Registration: Invoice Upload

Upload PDFs of an invoice(s) or other documentation that prove your relationship with the *Selected Suppliers*.

The Vault  
The Interchange Recycling

Program Home  
Switch Program

Program  
British Columbia  
Account  
Victoria Solutions  
Registration # PW-00000155

Registration  
Suppliers  
Customers  
Documents  
Summary

## Suppliers

Please select all companies who supply your business with Program Eligible Material.

Search for a business

If you cannot find the company who supplies your business, then you can request for the business to be added by contacting us, or by manually entering their details below.

### Selected Suppliers

Company Name	Address	Manage
Click Add Supplier to add to this table		

\* Do you pay environmental fees to all your suppliers?

### Invoice Upload

Please provide invoices or documentation proving your relationship with the above listed suppliers.

or Drag File

File Name

No results

The Vault  
The Interchange Recycling

Terms of Use  
Privacy Policy

Contact Us  
+1.888.722.8662  
Email: [admin@interchangerecycling.com](mailto:admin@interchangerecycling.com)  
Create a Support Case

Interchange Recycling is a trade name and trade mark of the British Columbia Used Oil Management Association.

\* Do you pay environmental fees to all your suppliers?

or Drop File

### Invoice Upload

Please provide invoices or documentation proving your relationship with the above listed suppliers.

File Name

No results

# Program Registration: Customers

Indicate if your organization sells Program Eligible Material to end users and/or resellers. This helps Interchange Recycling understand the distribution network.

The screenshot shows the 'Customers' registration page in The Vault system. The page is divided into several sections: 'Customers' (with two dropdown menus for 'Do you sell Program Eligible Materials to end users?' and 'Do you sell Program Eligible Materials to resellers?'), 'Customer List' (with a search bar and 'Add' button), 'Selected Customers' (with a table and 'Add Customer' button), and 'Invoice Upload' (with a file upload area and 'Upload File' button). The 'Customers' section is highlighted with a blue box, and a dashed blue line connects it to a magnified view on the right.

## Customers

\* Do you sell Program Eligible Materials to end users?

Yes

\* Do you sell Program Eligible Materials to resellers?

Yes

### Selling Program Eligible Material to Resellers:

If you select "Yes", you will be prompted to [fill out a Customer List](#) and upload supporting information.

# Program Registration: Customer List

If selling to resellers, you can provide a list of your customers.

*Note: This table only appears when the answer to “Do you sell Program Eligible Materials to resellers” is YES.*

The screenshot shows the 'Customers' registration page in 'The Vault' system. The page is titled 'Customers' and includes a sidebar with navigation options: Program Name, Switch Program, Program (British Columbia, Victoria Solutions), Account (Registration # PE-00000000), Registration, Suppliers, Customers, Documents, and Summary. The main content area is divided into sections: 'Customer List' (with a search box and 'Add' button), 'Selected Customers' (with a table header for Company Name, Address, and Manage, and an 'Add Customer' button), and 'Invoice Upload' (with a file upload area and 'Upload File' button). The footer contains 'The Vault' logo, 'Terms of Use' and 'Privacy Policy' links, contact information (+1-888-722-8662, admin@interchangerecycling.com), and social media icons.

## Customer List

Please select all companies to whom your company supplies Program Eligible Material. Include customers who are resellers only, do NOT include end users.

Search for a Business

Add

### Search for a Business:

Allows you to search and add users that have an active registration in The Vault and add them to your Customers List.

# Program Registration: Selected Customers

If the Customer does not already exist within The Vault, you can manually enter in their details.

The screenshot shows the 'Customers' page in The Vault. The 'Selected Customers' table is highlighted with a blue dashed box. The table has columns for 'Company Name', 'Address', and 'Manage'. An 'Add Customer' button is visible next to the table. Below the table is an 'Invoice Upload' section with a file upload field and buttons for 'Previous', 'Cancel', 'Save Draft', and 'Next'.

## Selected Customers

Company Name	Address	Manage
--------------	---------	--------

Click Add Customer to add to this table

Add Customer

## Add a Customer

\* Company Name  Contact Name

\* Phone  Email

\* Street Address  \* City

\* Country  \* Province/State  \* Postal/Zip Code

Cancel

For each Customer, you will be prompted to enter Company Name, Address, Contact Name & Email

# Program Registration: Invoice Upload

Upload PDFs of an invoice(s) or other documentation that prove your relationship with *your Customers*.

The screenshot shows the 'The Vault' program registration interface. The 'Customers' section is active, displaying a list of selected customers. A yellow box highlights the 'Invoice Upload' section, which contains the following text and elements:

**Invoice Upload**  
Please provide invoices or documentation proving your relationship with the above listed customers.

or Drop File

No results

## Invoice Upload

Please provide invoices or documentation proving your relationship with the above listed customers.

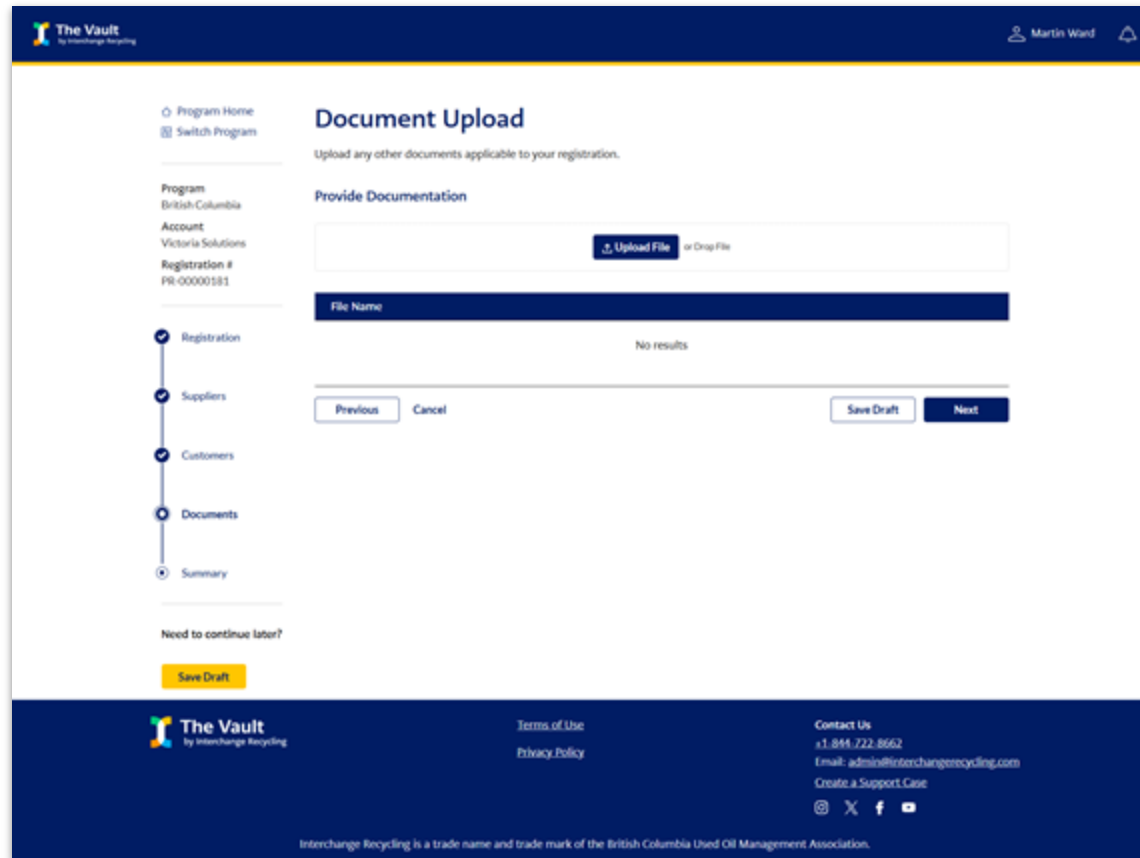
or Drop File

No results



# Program Registration: Documents

Upload any additional supporting documentation (as PDFs).



The screenshot shows the 'Document Upload' page in The Vault system. The page title is 'Document Upload' with the subtitle 'Upload any other documents applicable to your registration.' The main heading is 'Provide Documentation'. There is a file upload area with a button labeled 'Upload File' and the text 'or Drag File'. Below this is a 'File Name' field, which currently contains 'No results'. At the bottom of the upload area are buttons for 'Previous', 'Cancel', 'Save Draft', and 'Next'. On the left side, there is a navigation menu with options: 'Program Home', 'Switch Program', 'Program: British Columbia', 'Account: Victoria Solutions', 'Registration #: PR-0000181', and a vertical progress bar with steps: 'Registration' (checked), 'Suppliers' (checked), 'Customers' (checked), 'Documents' (active), and 'Summary'. At the bottom left of the page, there is a 'Need to continue later?' section with a 'Save Draft' button. The footer contains the 'The Vault' logo, 'Terms of Use', 'Privacy Policy', 'Contact Us' (1-844-722-8662, admin@interchangerecycling.com), and 'Create a Support Case'.

# Program Registration: Summary

Before a Program Registration is completed, you can review the information entered on a single page for accuracy.

The screenshot shows the 'Summary' page of the registration process. The left sidebar contains navigation links for Program Home, Switch Program, Registration, Suppliers, Customers, Documents, and Summary. The main content area is titled 'Summary' and includes a 'Registration' section with 'Business Information' (Business Start Date: December 1, 2023), 'Locations of Customers' (No results), and 'Program Eligible Materials' (Date of first supply: July 1, 2024). Below this are sections for 'Suppliers' and 'Customers', each with a table of entries and a 'Save Draft' button.

This screenshot focuses on the 'Customers' section. It contains two tables: 'Customer List' and 'Customer Invoices'. Below these is a 'Documents' section. A red box highlights a checkbox labeled 'I agree with the terms & conditions and confirm the information I have provided is accurate'. Below the checkbox are 'Previous', 'Cancel', 'Save Draft', and 'Save' buttons. The footer of the page includes 'The Vault' logo, 'Terms of Use', 'Privacy Policy', and contact information.

## Terms & Conditions:

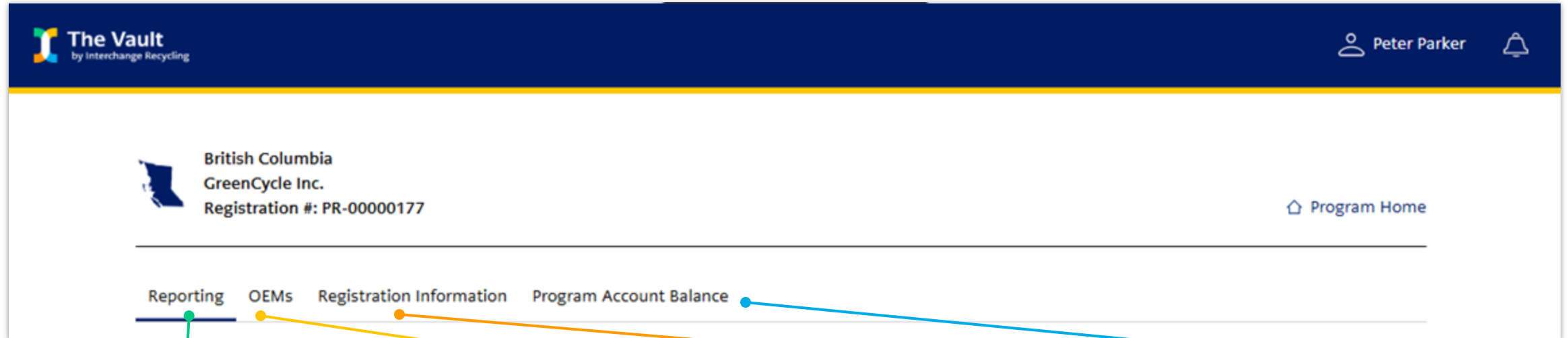
You must accept the program-specific Terms & Conditions to be able to submit a program registration.

# The Vault Homepages

Landing pages where you can manage information related to your organizations' registration(s) and EHC Reports. This includes enabling users to manage reporting obligations (including notifications) and your program account balance (e.g., view invoices).

# The Vault Homepages

The Member Homepage in The Vault shows four tabs:



## Reporting

View/manage EHC Reports or EHC Report Adjustments.

*This is the default tab for the homepage.*

## OEMs

View details of standard OEMs and create/manage custom OEMs.

## Registration Information

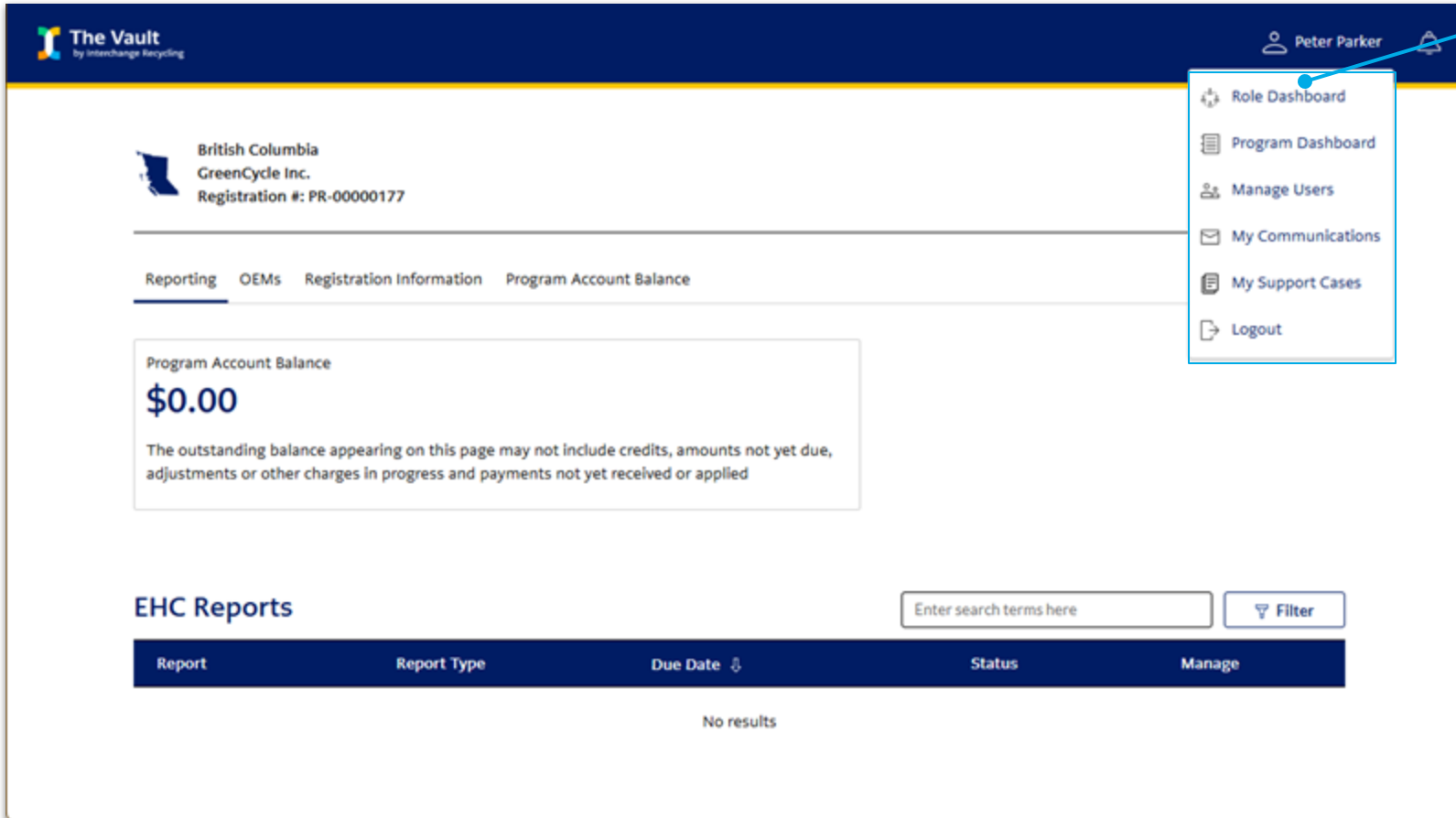
View information that was submitted as part of Program Registration.

## Program Account Balance

View Program Statements, Invoices, and Payments and Credits.

# The Vault Homepages: **Navigation Menu**

You can access a Navigation Menu by clicking on your User Avatar/Name in the top right corner.



The screenshot shows the user interface of 'The Vault' by Interchange Recycling. The user is logged in as Peter Parker. The navigation menu is open, listing the following options: Role Dashboard, Program Dashboard, Manage Users, My Communications, My Support Cases, and Logout. The main content area displays the user's registration information for British Columbia (GreenCycle Inc., Registration #: PR-00000177) and the Program Account Balance, which is \$0.00. Below this, there is a section for EHC Reports with a search bar and a filter button. The table below the search bar is currently empty, showing 'No results'.

## Navigation Menu:

- **Role Dashboard:** Takes you to the Role Selection page to register in a new Role or access all your current registered Roles.
- **Program Dashboard:** Allows you to access the Program Selection page to register in a new Program and access all your registered Programs.
- **Manage Users:** This is only visible for Account and Program Administrators and allows for managing which users can access The Vault on your organization's behalf.
- **My Communications:** Displays previously sent communications to the user account.
- **My Support Cases:** You can view submitted Support Cases and check the status.

# The Vault Homepages: Reporting Tab

The homepage for Members defaults to the *Reporting* tab.

## Page Header:

The page header on the homepage displays the:

- Program Icon
- Program Name
- Account Name
- Unique Program Registration Number

The screenshot shows the 'Reporting' tab of 'The Vault' interface. At the top, the user is identified as Peter Parker. A notification bell icon is present in the top right corner. The main content area displays the program details for 'British Columbia GreenCycle Inc.' with registration number PR-00000177. Below this, there are tabs for 'Reporting', 'OEMs', 'Registration Information', and 'Program Account Balance'. A warning message states 'You have pending reports to be completed.' The 'Program Account Balance' is shown as '\$0.00'. The 'EHC Reports' section includes a search bar and a table with one entry for 'October 2024' with a status of 'Not Started'.

Report	Report Type	Due Date	Status	Manage
October 2024	EHC Report	December 21, 2024	Not Started	Start

## Bell Notification:

New notifications will display here to alert you of a pending action item (refer to [Communications](#) for additional details)

# Manage Users

Configure functionality that allow the Program Admin to add additional users associated with your organization to The Vault.

# Manage Users Model

The Manage Users functionality in The Vault enables Program Admins to manage the users that can access the portal on your organization's behalf. These users are tagged to a department(s), for which they will receive targeted communication.

Roles	Assigned	Register for New Programs?	Add New Users?	Edit Existing Users?	Deactivate Existing Users?	Role Can Be Updated By?
<b>Account Administrator</b>	By default, to the user who created the Account (or has been assigned the role during data migration).	Yes	Yes	Yes	Yes	Interchange Recycling
<b>Program Administrator</b>	By the Account Admin to one of the Programs that the Account is registered for.	No	Yes <i>(within assigned program)</i>	Yes <i>(within assigned program)</i>	Yes <i>(within assigned program)</i>	Account Admin

**Departments:** Users can be attributed one or multiple Departments within the registered Programs, allowing them to receive targeted communications. These users cannot manage other users. Available departments are Finance, Operations, Administration, Marketing, and Environmental/Sustainability.



# Manage Users: Navigation Menu

From the Navigation Menu, you can access the Manage Users landing page by clicking on “Manage Users”.

The screenshot displays the 'The Vault' user interface. At the top left is the logo 'The Vault By Interchange Recycling'. The user's name 'Peter Parker' and a notification bell are in the top right. The main content area shows 'British Columbia GreenCycle Inc. Registration #: PR-00000177'. Below this are tabs for 'Reporting', 'OEMs', 'Registration Information', and 'Program Account Balance'. The 'Program Account Balance' section shows '\$0.00' with a note: 'The outstanding balance appearing on this page may not include credits, amounts not yet due, adjustments or other charges in progress and payments not yet received or applied'. At the bottom, there is an 'EHC Reports' section with a search bar and a 'Filter' button. A table header is visible with columns: Report, Report Type, Due Date, Status, and Manage. The table currently shows 'No results'. A navigation menu is open on the right side, listing: Role Dashboard, Program Dashboard, Manage Users (highlighted with a dashed yellow box), My Communications, My Support Cases, and Logout. A blue arrow points from the 'Manage Users' menu item to the text on the right.

## Navigation Menu:

- **Role Dashboard:** Takes you to the Role Selection page to register in a new Role or access all your current registered Roles.
- **Program Dashboard:** Allows you to access the Program Selection page to register in a new Program and access all your registered Programs.
- **Manage Users:** This is only visible for Account and Program Administrators and allows for managing which users can access The Vault on your organization's behalf.
- **My Communications:** Displays previously sent communications to your account.
- **My Support Cases:** You can view submitted Support Cases and check the status.

# Manage Users: Landing Page

Upon selecting “Manage Users” from the Navigation Page, the user will be redirected to the Manage Users landing page.

## Active Users:

Shows active users within the Account.

## Inactive Users:

When a user's access to The Vault is deactivated, they are moved to the *Inactive Users* tab.

The screenshot displays the 'Manage Users' interface for 'GreenCycle Inc.' within 'The Vault' system. At the top, the user 'Peter Parker' is logged in. The page features two tabs: 'Active Users' (selected) and 'Inactive Users'. Below the tabs is a table with columns for 'Name', 'Email', 'Program', 'Last Login', and 'Manage'. The table currently shows 'No results'. An 'Add a User' button is located to the right of the table. The footer contains the company logo, contact information, and social media links.

## Add a User:

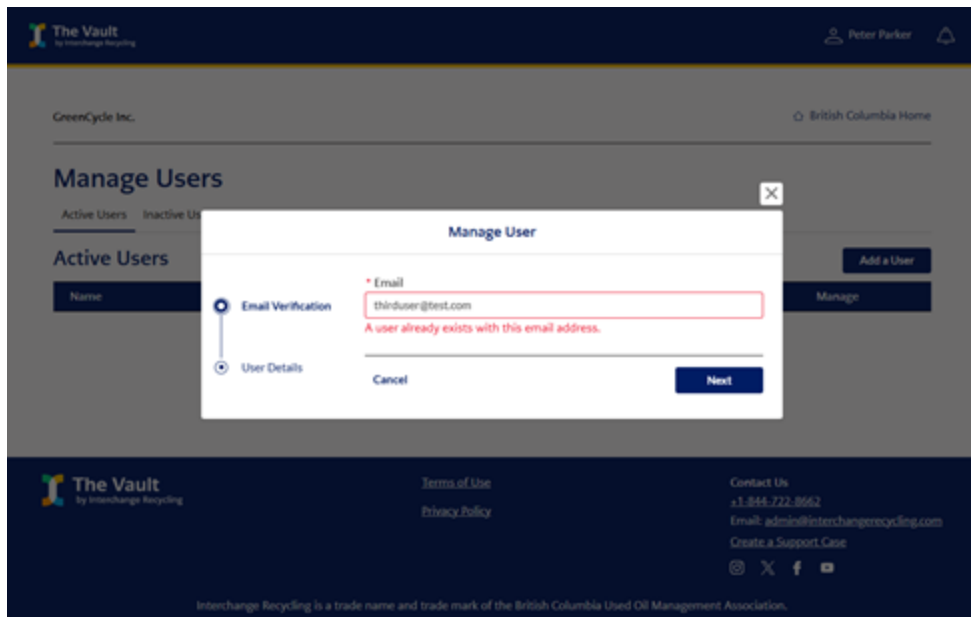
Account or Program Administrators can add a new user to assist in managing the account.

## Manage Options:

Account or Program Administrators can edit access or deactivate active users.

# Manage Users: Adding a User

Account and Program Administrators can manage user access to The Vault for their business. They can add, edit or deactivate users. To add a user, the Account or Program Admin begins by clicking “Add a User” and entering the new user’s email address. There are **three scenarios** when adding a User:



## 1. User does not exist in The Vault

- If the entered email address is not found, the administrator can continue to enter in the contact details for that new user and send them a registration email.

## 2. User already has a Vault login for this organization

- If the entered email matches an existing contact within the same account, the system will navigate the admin directly to the Edit modal. No new registration email is sent.

## 3. User already has a Vault login, but for a different organization

- If the entered email matches one associated with a different account, an error message will be displayed indicating that the email is already in use, and the administrator cannot proceed with adding this user. A different email address must be entered to continue.

# Manage Users: Adding a User

Once the user's email is populated, you can enter the new user's contact information as well as define the Program(s) they wish to enroll them in and assign them to a specific Department(s) per Program.

The screenshot shows the 'Manage User' interface. On the left, there are two tabs: 'Email Verification' (checked) and 'User Details' (selected). The 'User Details' tab contains the following fields:

- Email: emilie.rodier+46@pwc.com
- \* First Name: [Text Input]
- \* Last Name: [Text Input]
- \* Title: [Text Input]
- \* Business Phone: [Text Input]
- Phone Extension: [Text Input]
- British Columbia: [Dropdown Menu]

The dropdown menu for 'British Columbia' is open, showing the following options:

- British Columbia Department(s)
- Program Admin
- Finance
- Operations
- Administration
- Marketing
- Environmental/Sustainability

At the bottom of the form, there is a checkbox labeled '\* I hereby authorize this user to create/modify data'. This checkbox is highlighted with a green box. Below the checkbox are three buttons: 'Previous', 'Cancel', and 'Save'.

## Departments:

The Account Admin or Program Admin can assign Department(s) to the user.

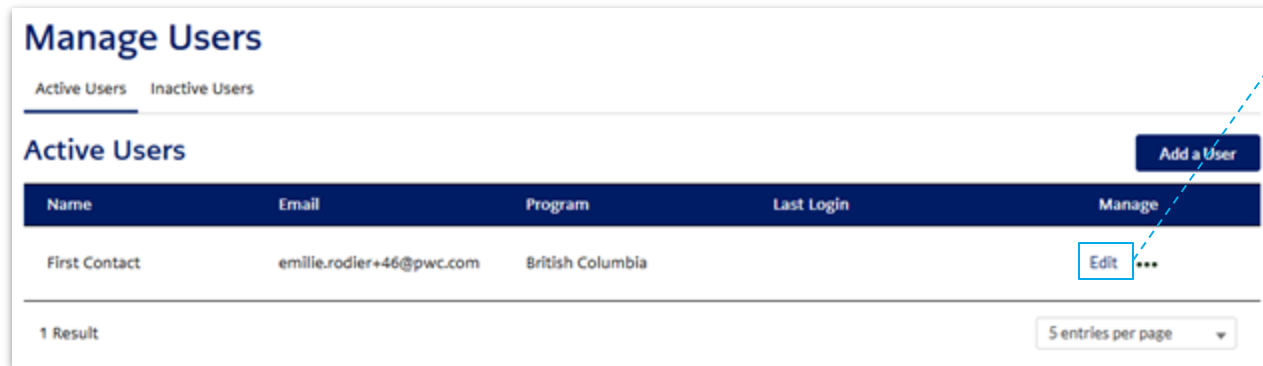
Note: Multiple Departments can be assigned to one user, and Different Departments can be assigned per user per Program. This is where a user can also be assigned the Program Admin access level.

## Attestation:

The Account or Program Admin must check the attestation box to authorize the new user to create or modify data.

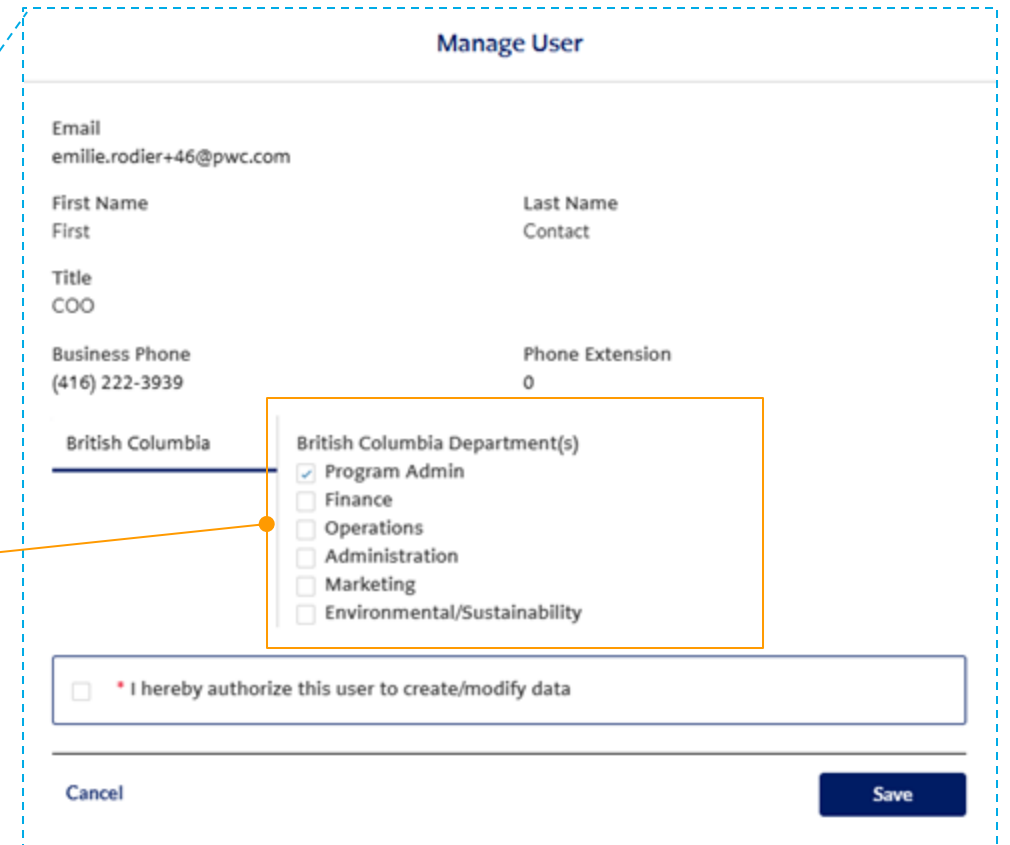
# Manage Users: Edit User

The **Account Admin** or users with the **Program Admin** department assigned can edit other users access to The Vault by clicking on the “Edit” button in the Manage column of the Active Users table.



The screenshot shows the 'Manage Users' interface. At the top, there are tabs for 'Active Users' and 'Inactive Users'. Below the tabs is a table titled 'Active Users' with columns: Name, Email, Program, Last Login, and Manage. The table contains one entry: 'First Contact', 'emilie.rodier+46@pwc.com', 'British Columbia'. The 'Manage' column for this entry has an 'Edit' button and a three-dot menu icon. A blue dashed box highlights the 'Edit' button. At the bottom of the table, it says '1 Result' and '5 entries per page'.

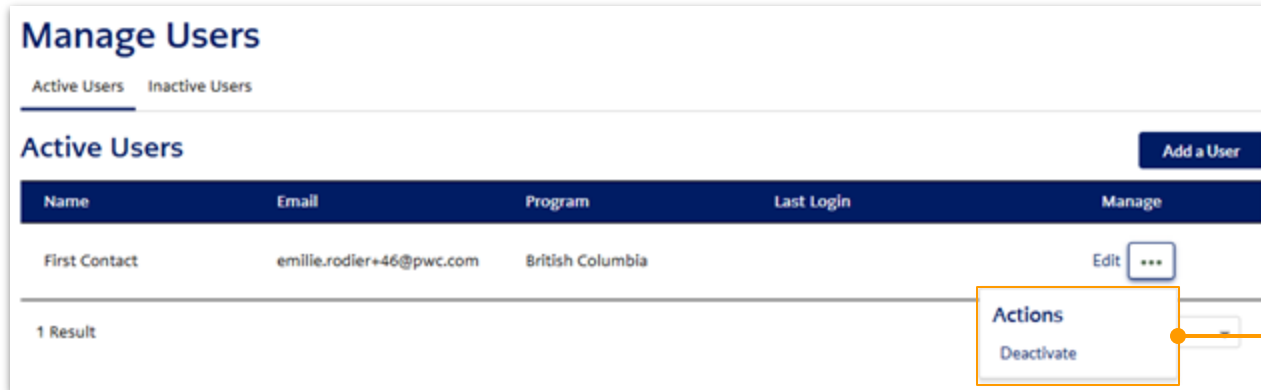
Only the departments can be edited, any other changes need to be done by [logging a Support Case](#) with Interchange Recycling.



The screenshot shows the 'Manage User' form. It contains the following fields: Email (emilie.rodier+46@pwc.com), First Name (First), Last Name (Contact), Title (COO), Business Phone ((416) 222-3939), and Phone Extension (0). Below these fields is a dropdown menu for 'British Columbia' which is open, showing a list of departments: Program Admin (checked), Finance, Operations, Administration, Marketing, and Environmental/Sustainability. Below the dropdown is a checkbox labeled '\* I hereby authorize this user to create/modify data'. At the bottom of the form are 'Cancel' and 'Save' buttons.

# Manage Users: Deactivate User

The **Account Admin** or users with the **Program Admin** department assigned can disable a user's access to The Vault by clicking on the "Deactivate" button in the Manage column of the Active Users table.



**Manage Users**

Active Users Inactive Users

**Active Users** Add a User

Name	Email	Program	Last Login	Manage
First Contact	emilie.rodier+46@pwc.com	British Columbia		Edit ...

1 Result

Actions  
Deactivate

## Deactivate User:

Account Admin or Program Admin can deactivate a user's access to The Vault by using the "Actions" button from the **Active Users** table. This will move the user to the **Inactive Users** table. The user will not receive any notifications.



**Manage Users**

Active Users Inactive Users

**Inactive Users**

Name	Email	Last Login	Manage
First Contact	emilie.rodier+46@pwc.com	None	Activate

1 Result

5 entries per page

## Reactivate User:

To restore access, find the user in the **Inactive Users** table and click 'Activate'. They must then be re-assigned to their applicable department(s). This will move the user to **Active Users** table. The user will receive a notification.

# Support Cases

You can access support from Interchange Recycling directly from The Vault by creating a support case. You can also track the status of your cases on the Support Cases landing page.

# Support Cases: Navigation Menu

From the Navigation Menu, you can access the Support Cases landing page by clicking on “My Support Cases”.

The screenshot displays the 'The Vault' user interface. At the top left is the logo 'The Vault By Interchange Recycling'. The user's name 'Peter Parker' and a notification bell are in the top right. The main content area shows 'British Columbia GreenCycle Inc. Registration #: PR-00000177'. Below this are tabs for 'Reporting', 'OEMs', 'Registration Information', and 'Program Account Balance'. A 'Program Account Balance' box shows '\$0.00' with a note: 'The outstanding balance appearing on this page may not include credits, amounts not yet due, adjustments or other charges in progress and payments not yet received or applied'. The 'EHC Reports' section has a search bar and a 'Filter' button. Below is a table header with columns: Report, Report Type, Due Date, Status, and Manage. The table currently shows 'No results'. A navigation menu is open on the right, listing: Role Dashboard, Program Dashboard, Manage Users, My Communications, My Support Cases (highlighted with a dashed orange box), and Logout. A blue arrow points from the 'My Support Cases' menu item to the text on the right.

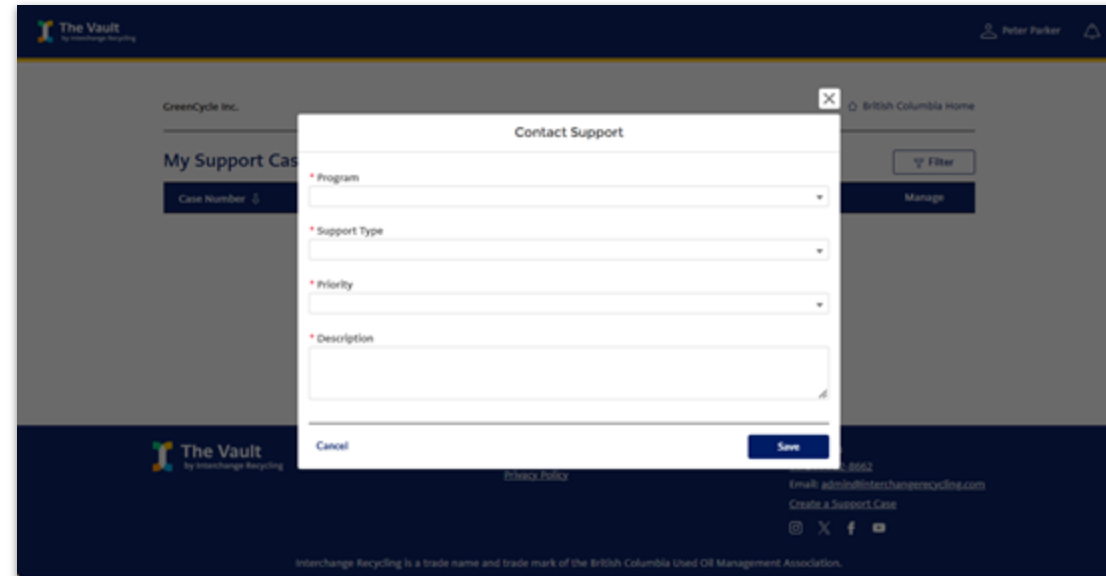
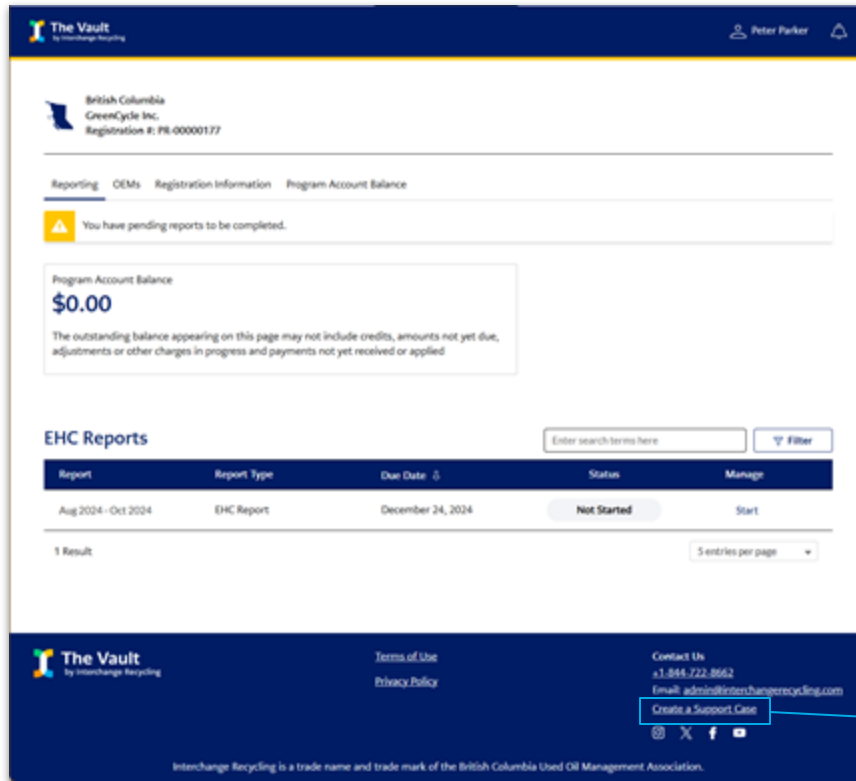
## Navigation Menu:

- **Role Dashboard:** Takes you to the Role Selection page to register in a new Role or access all your current registered Roles.
- **Program Dashboard:** Allows you to access the Program Selection page to register in a new Program and access all your registered Programs.
- **Manage Users:** This is only visible for Account and Program Administrators and allows for managing which users can access The Vault on your organization's behalf.
- **My Communications:** Displays previously sent communications to the user account.
- **My Support Cases:** You can view submitted Support Cases and check the status.



# Support Case: Creating a Support Case

You can seek help from Interchange Recycling by creating a support inquiry (a Support Case) in The Vault.



## Creating a Case:

You can select the Program, Support Type, Priority, and provide a description of your support request. This request is sent directly to Interchange Recycling to address through The Vault.

# My Support Cases Page

By clicking on “My Support Cases” in the Navigation Menu, the *My Support Cases* page is displayed, where you can view submitted Support Cases, and the status of each case.

The Vault  
by Interchange Recycling

Peter Parker

GreenCycle Inc. [British Columbia Home](#)

### My Support Cases

[Filter](#)

Case Number	Date Submitted	Program	Priority	Status	Manage
00001347	November 25, 2024	British Columbia	Medium	Open	<a href="#">View</a>

1 Result 5 entries per page

[Terms of Use](#) [Privacy Policy](#)

**Contact Us**  
+1-844-722-8662  
Email: [admin@interchangerecycling.com](mailto:admin@interchangerecycling.com)  
[Create a Support Case](#)

[@](#) [X](#) [f](#) [v](#)

Interchange Recycling is a trade name and trade mark of the British Columbia Used Oil Management Association.

### Case 00001347

Status: Open

Program: British Columbia

Support Type: Reporting

Priority: Medium

Description: I don't see my October 2024 EHC Report on the Reporting tab.

Date Submitted: November 25, 2024

# Managing OEMs

Members can report on Standard and Custom OEMs during EHC Reporting.

# Managing OEMs Overview

Within The Vault, there are two types of OEMs that can be used by a Member during EHC Reports:

- **Standard OEM:** These are OEMs that exist within The Vault and are managed by Interchange Recycling. You can add these to any EHC Report.
- **Custom OEM:** These are OEMs added by a Member for a specific Program Registration and are only available for that Member to report on.

The screenshot shows the 'The Vault' web application interface. At the top, it displays the user's name 'Martin Ward' and a 'Switch Program' button. Below this, the user's profile information is shown: 'British Columbia Victoria Solutions' and 'Registration #: BC-0000181'. The main content area is divided into two sections: 'Standard OEMs' and 'My Custom OEMs'. Each section has a search bar and a 'Filter' button. The 'Standard OEMs' table lists the following items:

OEM Name	Category	Code	Manage
Dumper - Compact	Construction Equipment	DECDUC	View
Dumper - Full size	Construction Equipment	DECDUF	View
Excavator - Compact	Construction Equipment	DECOEC	View
Excavator - Full size	Construction Equipment	DECOEF	View
Grader - Compact	Construction Equipment	DECOGC	View

The 'My Custom OEMs' table lists the following items:

OEM Name	Category	Manage
Truck (Custom)	Automotive	View
Dumper (Custom)	Construction Equipment	View

At the bottom of the page, there is a footer with 'The Vault' logo, 'Terms of Use', 'Privacy Policy', 'Contact Us' (with phone number +1 844 722 8662 and email admin@interchangerecycling.com), and 'Create a Support Case' button. Social media icons for Instagram, Twitter, Facebook, and YouTube are also present. A small note at the bottom states: 'Interchange Recycling is a trade name and trade mark of the British Columbia Used Oil Management Association.'

# Managing OEMs: Standard OEMs

From the OEMs tab on the homepage, you can review the list of Standards OEMs that are available for selection when completing an EHC report. The Standard OEMs have already been uploaded to The Vault for selection.

British Columbia  
GreenCycle Inc.  
Registration #: PR-00000177

Reporting OEMs Registration Information Program Account Balance

### Standard OEMs

Enter search terms here

OEM Name	Category	Code	Manage
Passenger Vehicles	Automotive	OEAUTP	<a href="#">View</a>
Light Trucks	Automotive	OEAUTL	<a href="#">View</a>
Medium Trucks / Buses / Motorhomes	Automotive	OEAUTM	<a href="#">View</a>
Heavy Duty Trucks / Buses / Motorhomes	Automotive	OEAUTH	<a href="#">View</a>
Tractor - FE01-1	Agriculture Equipment	OEA11	<a href="#">View</a>

Viewing 1 to 5 of 46 Results [Previous](#) 1 2 3 4 5 6 7 - 10 [Next](#) > 5 entries per page

### My Custom OEMs

Enter search terms here

OEM Name	Category	Manage
No results		

Note: A custom OEM cannot be edited or deleted once it has been created. Please Create a Support Case for assistance.

### View OEM

OEM Name: Passenger Vehicles  
OEM Type: Standard

Category: Automotive  
Code: OEAUTP

Description: This is a placeholder OEM description

Material Product Component	Code	Units	Unit Price	Fees
AF Mix	AFMIX	1	\$ 1 / L	CA\$1.00
AF Concentrate	AFCONC	5	\$ 1 / L	CA\$5.00
Motor or Lubricating Oils	OIL	2	\$ 1 / L	CA\$2.00
Total Per Unit				CA\$8.00

3 Results

When you select "View", you can view a summary of the Products included within the selected OEM, the associated units and applicable unit price.

# Managing OEMs: Custom OEMs

Custom OEMs are managed from the OEMs tab. The “My Custom OEMs” table displays the list of OEMs that users from your Account have created themselves. Custom OEMs are not shared with other Member Accounts.

British Columbia  
GreenCycle Inc.  
Registration #: PR-00000177

Reporting OEMs Registration Information Program Account Balance

### Standard OEMs

OEM Name	Category	Code	Manage
Passenger Vehicles	Automotive	OEAUTP	View
Light Trucks	Automotive	OEAUTL	View
Medium Trucks / Buses / Motorhomes	Automotive	OEAUTM	View
Heavy Duty Trucks / Buses / Motorhomes	Automotive	OEAUTH	View
Tractor - FE01-1	Agriculture Equipment	OEAT11	View

Viewing 1 to 5 of 46 Results

### My Custom OEMs

OEM Name	Category	Manage
No results		

Note: A custom OEM cannot be edited or deleted once it has been created. Please Create a Support Case for assistance.

### Create Custom OEM

OEM Name: Custom OEM Category: Agriculture Equipment

Description: This is a Custom OEM.

Reason for adding this as a Custom OEM: This is why I created my Custom OEM.

Search for a component to add to this OEM

Material Product Component	Code	Units	Unit Price	Fees	Manage
AF Concentrate	AFCONC		\$ 1 / L	CA\$0.00	Delete
Filter Less than 203 mm	FL203		\$ 1 / Each	CA\$0.00	Delete
Total Per Unit				CA\$0.00	

2 Results

Note: You cannot make changes to a Custom OEM once it has been saved. Please carefully review the information entered before clicking save.

Cancel Save

## Custom OEMs:

You can create custom OEMs by assigning a Product Name and Category, providing a description of the OEM, and explaining the reason for its creation. You can then select and quantify each component that should be included in the OEM.

Currently the only products available for selection in an OEM are Oils, Filters (both less than 203mm or more than 203mm), Antifreeze Mix and Diesel Exhaust Fluids (Yukon only)

*Note: Once created, a Custom OEM cannot be edited or deleted to avoid disruption to EHC report data.*

# EHC Reports

EHC Reports are automatically generated, depending on the reporting cadence (e.g., monthly, quarterly, annually), for Members to complete directly in The Vault.

# EHC Reports: Typical Flow

EHC Reports will be automatically generated for Members based on their defined reporting cadence - Monthly, Quarterly, or Annually. Once you click the “Start” button for an automatically generated EHC Report, there are three steps associated with completing a report in The Vault.



**Step 1** If applicable, select an existing Standard or Custom OEM, or add a Custom OEM, to report on. Add the applicable units for each OEM added to the EHC Report.

**Step 2** Report on the units for non-Container products and/or Container Products (depending on what is applicable for the Member).

Non-Container products:

- BC: Oils, Filters, Antifreeze/Glycols
- Yukon: Oils, Filters, Antifreeze/Glycols, Diesel Exhaust Fluids

Container products:

- BC: Oil Containers, Antifreeze/Glycol Containers
- Yukon: Oil Containers, Antifreeze/Glycol Containers, Diesel Exhaust Fluid Containers

*Fees are automatically calculated based on the units entered and the unit price.*

**Step 3** Before submitting an EHC Report, you can review the entered information for accuracy and make any necessary changes.



# EHC Reports: Report Statuses

EHC Reports and EHC Adjustments are assigned a Status to indicate their progression through the report submission flow. Depending on the Status, the report may be editable or may allow for an adjustment request to be submitted.

Status	Description	Editable	Adjustable
<b>Not Started</b>	Default state for newly created EHC Report	Yes	No
<b>In Progress</b>	Values have been entered into the EHR Report, but it has not been submitted by the Member	Yes	No
<b>Delinquent</b>	EHC Report is still in progress, but it is past the due date	Yes	No
<b>Submitted</b>	EHC Report has been submitted to Interchange Recycling	No	Yes
<b>Under Review</b>	EHC Report is being reviewed by Interchange Recycling	No	No
<b>Approved</b>	Interchange Recycling approved the EHC report	No	Yes
<b>Declined</b>	Interchange Recycling declined the EHC Report. and an adjustment must be completed by the Member	No	No
<b>Adjusted</b>	An adjustment has been initiated for the EHC Report	No	No

# EHC Reports: Reporting Homepage Tab

Once registered in a Program, Members can navigate to the homepage and will land on your Reporting tab by default.

**Page Banner:**

If you have pending or overdue reports to be completed, a message will be displayed here.

**EHC Reports Table:**

This table displays all EHC Reports, organized by their Report Name (i.e., the reporting period). They are categorized by type (EHC Report or EHC Adjustment), due date, and status.

The screenshot shows the 'Reporting' tab for 'GreenCycle Inc.' with registration # PR-00000177. A yellow banner with a warning icon states 'You have pending reports to be completed.' Below this is the 'Program Account Balance' section showing '\$0.00' with a note: 'The outstanding balance appearing on this page may not include credits, amounts not yet due, adjustments or other charges in progress and payments not yet received or applied'. At the bottom is the 'EHC Reports' table with one entry for 'October 2024' (EHC Report, Due Date: December 21, 2024, Status: Not Started). A 'Manage' button with a 'Start' option is visible in the table's 'Manage' column.

**Program Account Balance:**

Your current Account Balance for this Program is displayed.

\*Program Account Balance = Starting Balance + Invoices - Payments - Credits

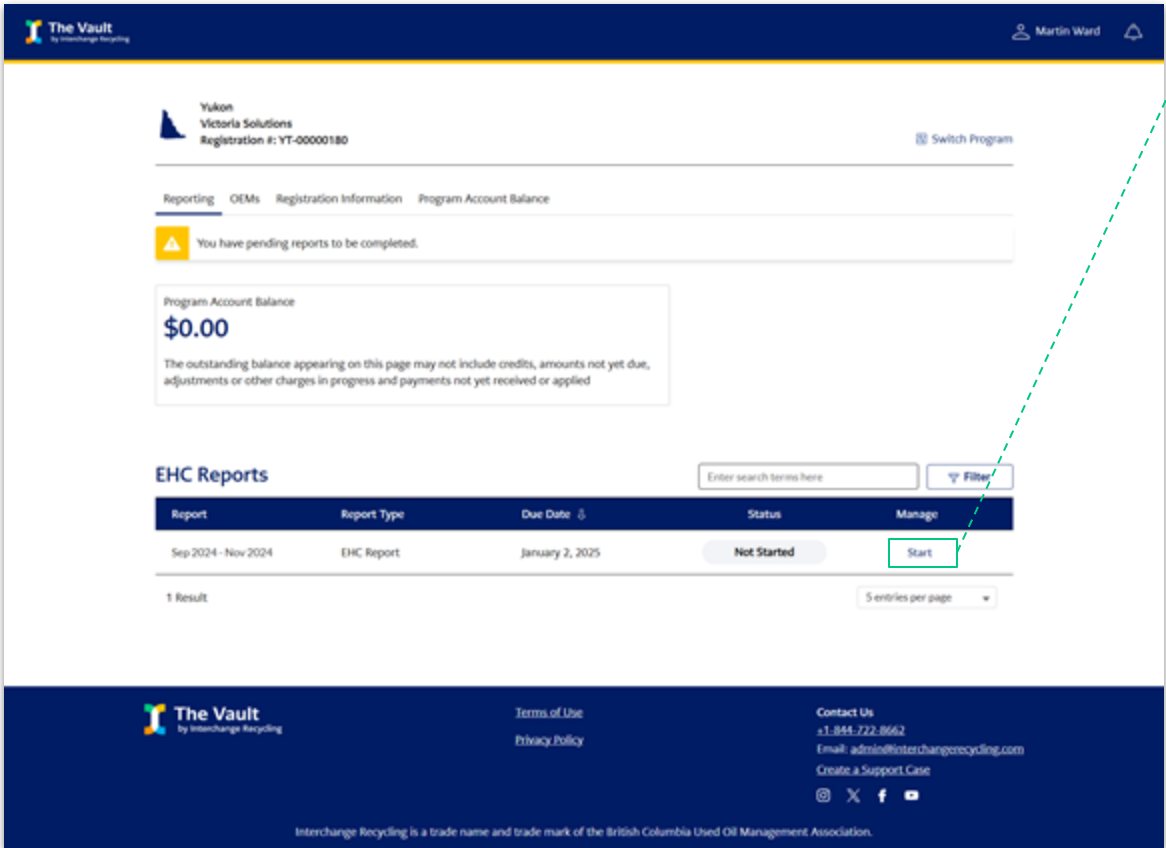
*Note: Members are encouraged to review the Program Account Balance when paying invoices to ensure you are not making overpayments by looking at individual invoice balances instead of adjusted balances.*

**Manage Action Column:**

Shows the action available depending on the status of each Report.

# EHC Reports: Starting an EHC Report

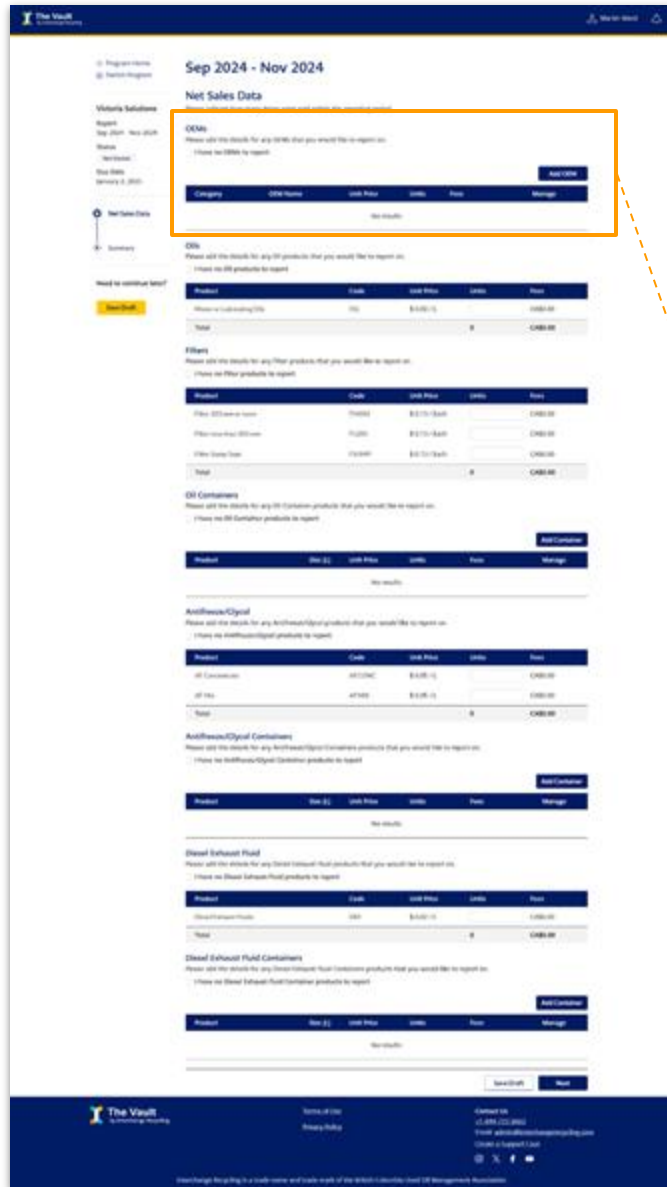
Depending on your Reporting Schedule, an EHC Report will be automatically generated and appear on the EHC Reports table either monthly, quarterly, or annually. By default, all new Members are initially setup as quarterly.



**Starting an EHC Report:** When an EHC Report is ready for completion, it will appear in the EHC Reports table with a status of "Not Started". You can click "Start" in the Manage action column to begin filling out your EHC Report.

# EHC Reports: Adding Standard and Custom OEMs

Members can select an existing Standard or Custom OEM, or add a Custom OEM, to report on.



**OEMs**  
Please add the details for any OEMs that you would like to report on.

I have no OEMs to report

**Add OEM**

Category	OEM Name	Unit Price	Units	Fees	Manage
No results					

**Add OEM:**  
If you have OEMs to report on, clicking "Add OEM" will enable you to select an existing Standard or Custom OEM, or create a new Custom OEM entirely.

**Add OEM**

Search for an OEM to add to this report

**Create a New OEM**

Cancel **Add**

## Search for Existing OEMs:

All existing Standard and Custom OEMs listed under the OEMs tab on your Homepage can be searched for here.

## Create a New OEM:

Members can create new Custom OEMs that will be available for current and future EHC Reports.

# EHC Reports: Adding an Existing OEM

When an existing (Standard or Custom) OEM is searched for and selected, a pop-up modal displays information about the selected OEM. The descriptive fields for the OEM are shown (name, type, category, code and description) plus the product components included within that OEM, their code, units, unit price and total fee.

The screenshot shows the 'Add OEM' modal with a search bar containing 'passenger'. A dropdown menu is open, showing 'Passenger Vehicles' as the selected option. There are 'Cancel' and 'Add' buttons. A blue box highlights the 'Add' button, with a line pointing to the 'Units Sold' field in the next screenshot.

## Units Sold:

Members are required to enter the total number of Units Sold in order to add this to their EHC report.

The detailed screenshot shows the 'Add OEM' modal with the following information:

- Search for an OEM to add to this report: Passenger Vehicles
- Create a New OEM button
- OEM Name: Passenger Vehicles
- OEM Type: Standard
- Category: Automotive
- Code: OEAUTP
- Description: \*
- Units Sold: (input field)
- Table of Material Product Components:

Material Product Component	Code	Units	Unit Price	Fees
AF Mix	AFMIX	1	\$ 1 / L	CA\$1.00
AF Concentrate	AFCONC	5	\$ 1 / L	CA\$5.00
Motor or Lubricating Oils	OIL	2	\$ 5 / L	CA\$10.00
Total Per Unit				CA\$16.00

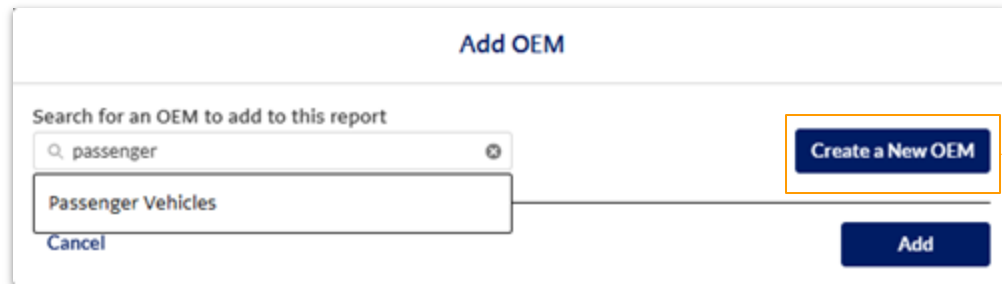
3 Results

Review the details above and click the Add button below to add this OEM to your report.

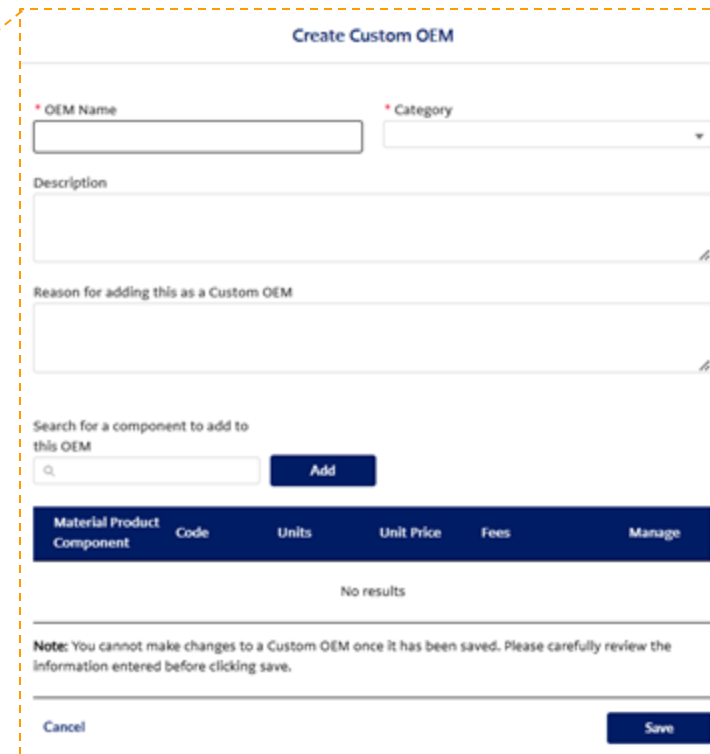
Cancel Add

# EHC Reports: **Creating a New Custom OEM**

If you opt to create a new Custom OEM, a pop-up modal displays the necessary data input fields. You must search for the individual products to be included in their Custom OEM and define how many units of each product should be included.



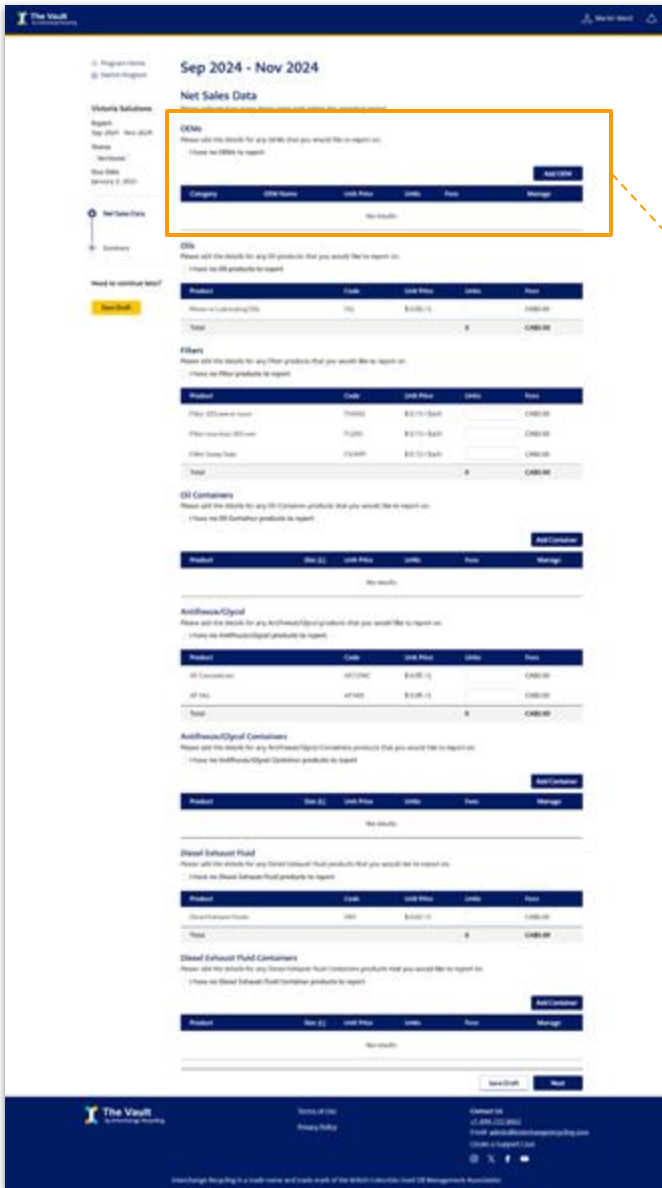
The 'Add OEM' modal features a search bar with the text 'passenger' and a dropdown menu showing 'Passenger Vehicles'. A 'Create a New OEM' button is highlighted with an orange box. Other buttons include 'Cancel' and 'Add'.



The 'Create Custom OEM' modal contains several input fields: 'OEM Name' (required), 'Category' (required dropdown), 'Description', and 'Reason for adding this as a Custom OEM'. Below these is a search bar for components with an 'Add' button. A table with columns 'Material Product Component', 'Code', 'Units', 'Unit Price', 'Fees', and 'Manage' is shown with 'No results'. A note at the bottom states: 'Note: You cannot make changes to a Custom OEM once it has been saved. Please carefully review the information entered before clicking save.' Buttons for 'Cancel' and 'Save' are at the bottom.

# EHC Reports: Review Added OEMs

Once the desired Existing and/or Custom OEMs have been added to the EHC Report, you can review (and edit if needed) the reported units per OEM /andor remove OEMs added.



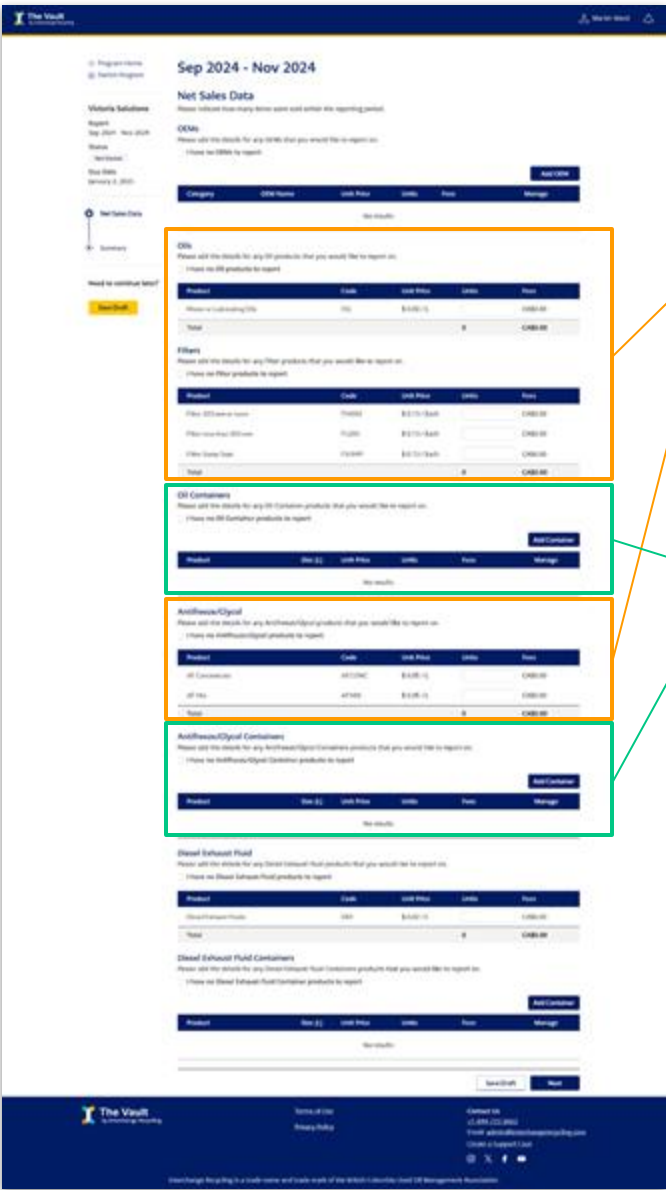
**OEMs**  
Please add the details for any OEMs that you would like to report on.

I have no OEMs to report

Category	OEM Name	Unit Price	Units	Fees	Manage
Automotive	Passenger Vehicles	\$ 16 / Each	<input type="text" value="10"/>	CA\$160.00	<input type="button" value="View"/> <input type="button" value="..."/>
<b>Total</b>			<b>10</b>	<b>CA\$160.00</b>	

**Units:**  
The Units field can be updated to reflect the total amount of reported units per OEM.

**Manage Actions Column:**  
The Manage actions allow the User the ability to remove the OEM entirely from the EHC Report or view the OEM's description and product component breakdown.



# EHC Reports: Reporting on Products

The Products on an EHC Report fall into two broad categories: Non-Containers and Containers.

## Non-Container Products:

- BC: Oils, Filters, Antifreeze/Glycols
- Yukon: Oils, Filters, Antifreeze/Glycols, Diesel Exhaust Fluids

By default, all products within these categories are displayed on an EHC Report

## Container Products:

- BC: Oil Containers, Antifreeze/Glycol Containers
- Yukon: Oil Containers, Antifreeze/Glycol Containers, Diesel Exhaust Fluid Containers

By default, these products must be individually added to the report by Members who must select a category of container size and enter in the specific container size.



# EHC Reports: Reporting Non-Container Products

For non-Container products you enter the total number of units to report per product. The fees are automatically calculated based on the units entered and the unit price.

**Oils**  
Please add the details for any Oil products that you would like to report on.

I have no Oil products to report

Product	Code	Unit Price	Units	Fees
Motor or Lubricating Oils	OIL	\$ 5 / L	<input type="text" value="10"/>	CA\$50.00
<b>Total</b>			<b>10</b>	<b>CA\$50.00</b>

**Filters**  
Please add the details for any Filter products that you would like to report on.

I have no Filter products to report

Product	Code	Unit Price	Units	Fees
Filter 203 mm or more	FM203	\$ 1 / Each	<input type="text" value="10"/>	CA\$10.00
Filter Less than 203 mm	FL203	\$ 1 / Each	<input type="text" value="10"/>	CA\$1.00
Filter Sump type	FSUMP	\$ 1 / Each	<input type="text" value="10"/>	CA\$10.00
<b>Total</b>			<b>30</b>	<b>CA\$21.00</b>

**“I have no products to report”:**

If you have no products within a category to report, selecting this checkbox hides the table and reports all applicable products equal to 0 Units.

**Unit Price:**

Interchange Recycling’s fees for each of the Product categories - i.e., per Litre or Each is shown here. This is a non-editable field for Members.

**Fees:**

The total fees based on the Unit Price and the Units entered. This is a non-editable field for Members.

**Units:**

The total units your organization sold for the reporting period.

# EHC Reports: Reporting Container Products

For Container products, nothing is listed initially on an EHC Report. You must click the “Add Container” button to add individual Product details. The fees are automatically calculated based on the units entered and the unit price.

**Oil Containers**  
Please add the details for any Oil Container products that you would like to report on.

I have no Oil Container products to report

**Add Container**

Product	Size (L)	Unit Price	Units	Fees	Manage
No results					

**Oil Containers**  
Please add the details for any Oil Container products that you would like to report on.

I have no Oil Container products to report

**Add Container**

Product	Size (L)	Unit Price	Units	Fees	Manage
OC 10 Litres to 19.999 Litres	10	\$ 0.15 / L	<input type="text" value="15"/>	CA\$22.50	Remove
<b>Total</b>			<b>15</b>	<b>CA\$22.00</b>	

**Add Product**

Category  
Oil Containers

\* Product  
OC 10 Litres to 19.999 Litres

\* Size (Litres)

**Cancel** **Save**

**Product & Size:** You must select the applicable product from a predefined drop-down list (only products from the current Container category are shown) and enter a specific container size (up to 3 decimal places).

Once you click “Save”, the Container details are added onto the EHC Report. You then need to enter in the total units to report on for that specific container size .

# EHC Reports: Summary

Before an EHC Report is submitted, you can review the data entered on a single page for accuracy. Once a report has been submitted it can no longer be edited by you. If changes are required, an adjustment to the submitted EHC Report must be made.

The screenshot displays the EHC Report Summary interface. It includes a sidebar with navigation options like 'Program Home', 'Switch Program', and 'Victoria Solutions'. The main content area is titled 'Sep 2024 - Nov 2024' and contains several data sections, each with an 'Edit' button:

- Net Sales Data:** A table with columns 'Product', 'Code', 'Unit Price', 'Units', and 'Fee'. It lists 'Motor or Lubricating Oils' with a total fee of CAD2.00.
- Filters:** A section with an 'Edit' button.
- Oil Containers:** A table with columns 'Product', 'Size (L)', 'Unit Price', 'Units', and 'Fee'. It lists 'OC 2 Litres to 2.999 Litres' with a total fee of CAD9.20.
- Antifreeze/Glycol:** A section with an 'Edit' button.
- Antifreeze/Glycol Containers:** A section with an 'Edit' button.
- Diesel Exhaust Fluid:** A table with columns 'Product', 'Code', 'Unit Price', 'Units', and 'Fee'. It lists 'Diesel Exhaust Fluid' with a total fee of CAD4.00.
- Diesel Exhaust Fluid Containers:** A section with an 'Edit' button.

At the bottom of the form, there is a checkbox for attestation:  "I certify that I have the authority to submit this information and that the details provided are correct." Below this checkbox are 'Previous' and 'Submit' buttons.

## Edit:

If you want to make edits to the entered data, you can click the “Edit” button in the desired section to return to the previous page to make changes.

## Attestation:

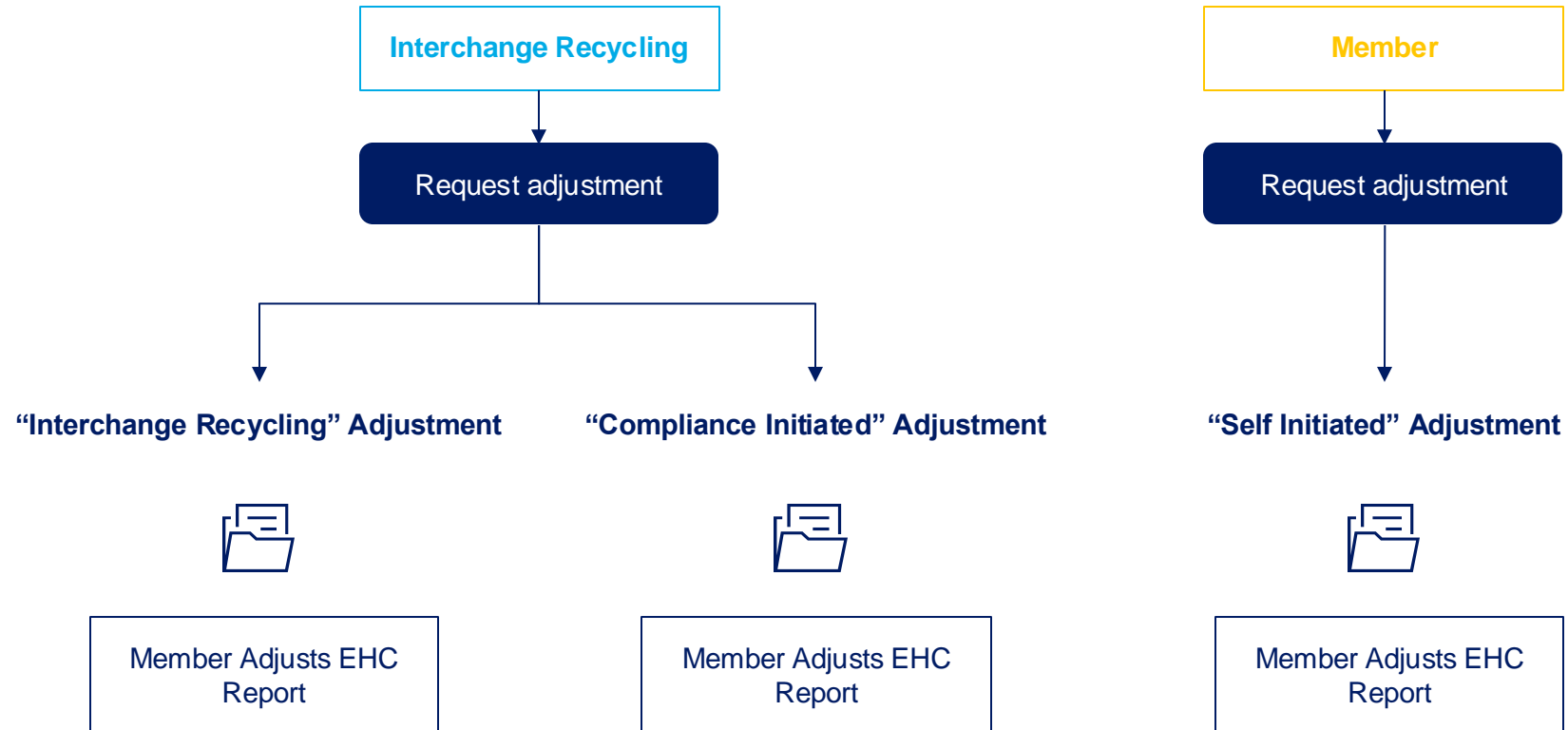
You must agree to the Terms & Conditions (by selecting this checkbox) to submit an EHC Report.

# EHC Report Adjustments

For previously submitted EHC Reports, either the Member or Interchange Recycling can request and complete adjustments on the data entered.

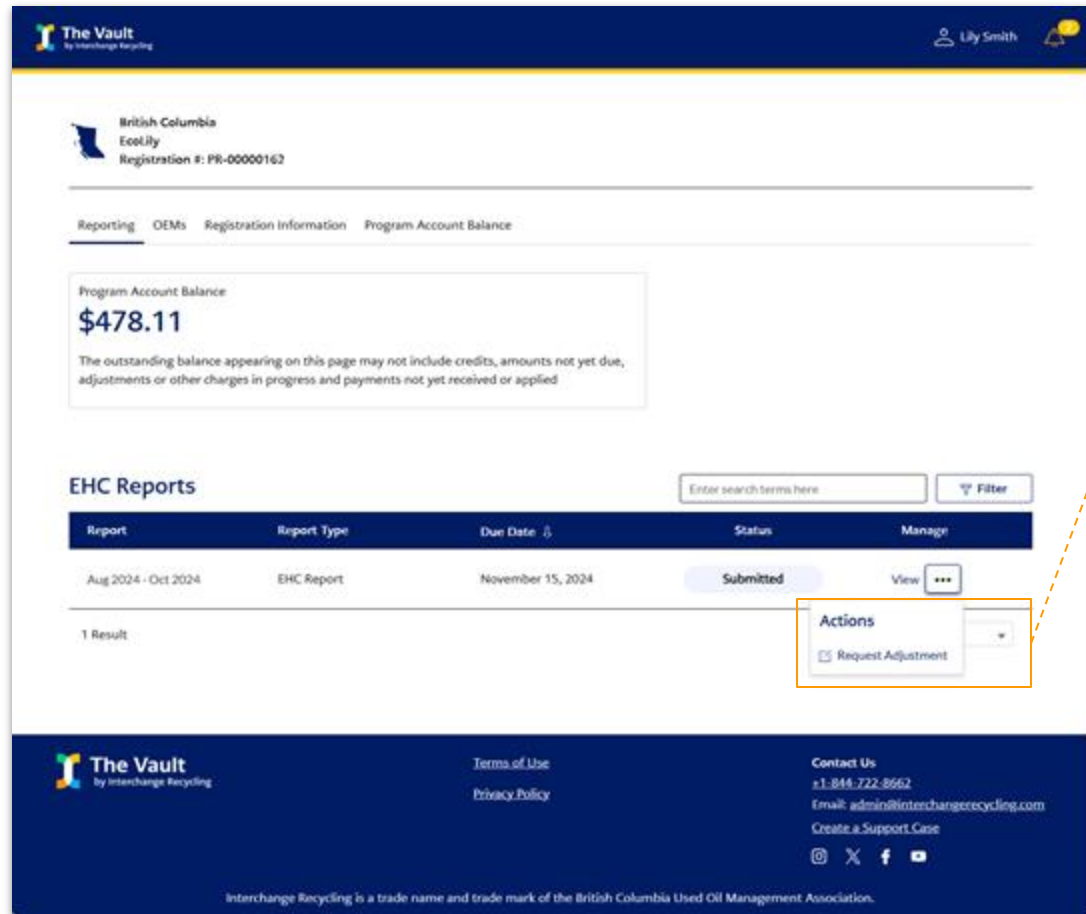
# EHC Report Adjustments Model

If an adjustment is needed to a previously submitted EHC Report, it must go through an adjustment process. This can be initiated by Interchange Recycling or a Member.



# EHC Report Adjustments: Requesting an Adjustment

Once a Member has submitted an EHC Report, the only way to make changes is to request an adjustment.



The screenshot shows the 'The Vault' web interface. At the top, the user is identified as Lily Smith. The main content area displays the 'Program Account Balance' as \$478.11. Below this, there is a section for 'EHC Reports' with a search bar and a filter button. A table lists one report: 'Aug 2024 - Oct 2024', 'EHC Report', 'November 15, 2024', with a status of 'Submitted'. An 'Actions' dropdown menu is open for this report, showing a 'Request Adjustment' option. The footer contains contact information for Interchange Recycling.



This is a modal window titled 'Adjustment Reason'. It prompts the user to 'Please select the category that best describes the reason for this adjustment.' There is a dropdown menu for 'Adjustment Reason Category' and buttons for 'Cancel' and 'Save'.

## Request Adjustment:

You can initiate an adjustment to a previously submitted EHC Report by clicking “Request Adjustment” under the Manage actions column. This only appears if the report has a status of “Submitted”.

# EHC Report Adjustments: **Not Started Adjustment**

Once an adjustment is requested, the original EHC Report is moved to the status of “Adjusted” and a new EHC Report Adjustment is created. This is denoted as the first version of the EHC Report Adjustment for that specific EHC Report.

## EHC Report Adjustment Version:

Every EHC Report Adjustment requested will have a version number so that both the Member and Interchange Recycling can keep track of the changes that have been made.

Report	Report Type	Due Date	Status	Message
October 2024 (Adj, v1)	EHC Report Adjustment	January 5, 2025	Not Started	Start
October 2024	EHC Report	December 31, 2024	Adjusted	View

## Requested EHC Report Adjustment:

The EHC Report Adjustment duplicates the originally submitted EHC Report so you can make the necessary changes.

## Original EHC Report:

When the adjustment is initiated the original EHC Report goes to a status of “Adjusted”.

# EHC Report Adjustments: Reporting an Adjustment

An EHC Report Adjustment looks very similar to the original EHC Report but has the ability to add “Revised Units” which will update the fees. The report shows the previous and revised units and fees for the Member to see.

**Net Sales Data**

Category	OEM Name	Previous Units	Revised Units	Previous Fees	Revised Fees	Fees Difference	Manage
Agriculture Equipment	Custom OEM 2	15	15	CA\$450.00	CA\$450.00	CA\$0.00	View
Automotive	Passenger Vehicles	10	10	CA\$160.00	CA\$160.00	CA\$0.00	View
Total		25	25	CA\$610.00	CA\$610.00	CA\$0.00	

**Oils Adjustment**

Product	Previous Units	Revised Units	Previous Fees	Revised Fees	Fees Difference
Motor or Lubricating Oils	10	10	CA\$50.00	CA\$50.00	CA\$0.00
Total	10	10	CA\$50.00	CA\$50.00	CA\$0.00

## Previous Units and Fees:

The units and fees entered in the EHC Report Adjustment completed previously to this one.

## Revised Units and Fees:

Updated units and fees entered as part of this adjustment.

## Fees Difference:

The difference in the first EHC Report Adjustment entered fees and the adjusted fees from the second EHC Report Adjustment.



# EHC Report Adjustments: Submitted Adjustment Under Review

Any adjustments made to submitted EHC Reports will need to be approved by Interchange Recycling.

The screenshot displays the 'The Vault' user interface for GreenCycle Inc. The page shows a 'Program Account Balance' of \$904.00 and a table of 'EHC Reports'. One report, 'October 2024 (Adj. v1)', is in the 'Under Review' status, highlighted with a green box and a green dot. Another report, 'October 2024', is in the 'Adjusted' status. The footer contains contact information for Interchange Recycling.

Report	Report Type	Due Date	Status	Manage
October 2024 (Adj. v1)	EHC Report Adjustment	January 5, 2025	Under Review	View
October 2024	EHC Report	December 21, 2024	Adjusted	View

## Submitted EHC Report Adjustment:

When the adjustment is submitted, it is sent to Interchange Recycling to review and either approve or reject. During this time the EHC Report Adjustment is in the status of "Under Review".

# EHC Report Adjustments: Adjustment v1 Reviewed & Declined

If an EHC Report Adjustment is declined by Interchange Recycling, the status is updated to “Declined”, a reason for the rejection is provided on the report, and a new version of the adjustment is created.

British Columbia  
GreenCycle Inc.  
Registration #: FR-00000177

Reporting | OEMs | Registration Information | Program Account Balance

You have pending reports to be completed.

Program Account Balance  
**\$904.00**

The outstanding balance appearing on this page may not include credits, amounts not yet due, adjustments or other charges in progress and payments not yet received or applied

### EHC Reports

Report	Report Type	Due Date	Status	Message
October 2024 (Adj. v2)	EHC Report Adjustment	January 5, 2025	Not Started	Start
October 2024 (Adj. v1)	EHC Report Adjustment	January 5, 2025	Declined	View
October 2024	EHC report	December 21, 2024	Adjusted	View

3 Results | 5 entries per page

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## Declined Reason:

When an EHC Report Adjustment is declined, Interchange Recycling will provide a reason that is visible on the report.

## EHC Report Adjustment v2:

When the first version of the EHC Report Adjustment is declined, another version (v2) is created with a status of “Not Started” for the Member to complete again.

## Decline the Adjustment:

If Interchange Recycling declines the adjustment, the status is automatically changed to “Declined”.

GreenCycle Inc.  
Report: October 2024 (Adj. v1)  
Status: Declined  
Due Date: January 5, 2025

### Summary

The following information was included on the submitted report:

**Declined Reason:** Report Adjustment Decision test.

### Net Sales Data

Please indicate how many items were sold within the reporting period.

#### OEMs Adjustment

Category	OEM Name	Prebook Units	Rebook Units	Prebook Fees	Rebook Fees	Fee Difference
Agriculture Equipment	Custom OEM 2	15	30	CAD0.00	CAD0.00	CAD0.00
Automotive	Passenger Vehicles	10	20	CAD0.00	CAD0.00	CAD0.00
Total		25	50	CAD0.00	CAD0.00	CAD0.00

#### Oils Adjustment

Product	Prebook Units	Rebook Units	Prebook Fees	Rebook Fees	Fee Difference
Motor or Lubricating Oils	10	20	CAD0.00	CAD0.00	CAD0.00
Total	10	20	CAD0.00	CAD0.00	CAD0.00

#### Filters Adjustment

Product	Prebook Units	Rebook Units	Prebook Fees	Rebook Fees	Fee Difference
Filter 200 mm or more	0	5	CAD0.00	CAD0.00	CAD0.00
Filter Less than 200 mm	0	5	CAD0.00	CAD0.00	CAD0.00
Filter Sump/pan	0	5	CAD0.00	CAD0.00	CAD0.00
Total	0	15	CAD0.00	CAD0.00	CAD0.00

#### Oil Containers Adjustment

Product	Size (L)	Prebook Units	Rebook Units	Prebook Fees	Rebook Fees	Fee Difference
		0	5	CAD0.00	CAD0.00	CAD0.00
Total		0	5	CAD0.00	CAD0.00	CAD0.00

#### Auxiliaries/Oil Adjustment

Product	Prebook Units	Rebook Units	Prebook Fees	Rebook Fees	Fee Difference
AT Concentrate	10	20	CAD0.00	CAD0.00	CAD0.00
AT Mix	10	20	CAD0.00	CAD0.00	CAD0.00
ATC Less than 100ml	10	20	CAD0.00	CAD0.00	CAD0.00
Total	30	60	CAD0.00	CAD0.00	CAD0.00

#### Auxiliaries/Oil Containers Adjustment

Product	Size (L)	Prebook Units	Rebook Units	Prebook Fees	Rebook Fees	Fee Difference
ATC 1 litre to 5.99 litres	20	10	20	CAD0.00	CAD0.00	CAD0.00
Total		10	20	CAD0.00	CAD0.00	CAD0.00

Acknowledgment  
Approved by Peter Parker on Friday, November 22, 2024 at 12:11 PM

# EHC Report Adjustments: **Adjustment v2 Reviewed & Approved**

If an EHC Report Adjustment is approved by Interchange Recycling, the status is updated to “Approved” and an invoice can be manually generated.

The screenshot shows the 'Program Account Balance' at \$904.00. Below it, the 'EHC Reports' table lists three reports. The first report, 'October 2024 (Adj. v2)', has a status of 'Under Review'. The second report, 'October 2024 (Adj. v1)', has a status of 'Declined'. The third report, 'October 2024', has a status of 'Adjusted'.

Report	Report Type	Due Date	Status	Manage
October 2024 (Adj. v2)	EHC Report Adjustment	January 5, 2025	Under Review	View
October 2024 (Adj. v1)	EHC Report Adjustment	January 5, 2025	Declined	View
October 2024	EHC Report	December 21, 2024	Adjusted	View

The screenshot shows the 'Program Account Balance' at \$904.00. Below it, the 'EHC Reports' table lists three reports. The first report, 'October 2024 (Adj. v2)', has a status of 'Approved'. The second report, 'October 2024 (Adj. v1)', has a status of 'Declined'. The third report, 'October 2024', has a status of 'Adjusted'.

Report	Report Type	Due Date	Status	Manage
October 2024 (Adj. v2)	EHC Report Adjustment	January 5, 2025	Approved	View ***
October 2024 (Adj. v1)	EHC Report Adjustment	January 5, 2025	Declined	View
October 2024	EHC Report	December 21, 2024	Adjusted	View

# Automated Delinquencies

When a Member has not submitted an EHC Report or paid an Invoice on time there is an automatic flag created based on defined criteria (e.g., days past due date, amounts outstanding). These generate delinquencies which notify internal staff and send reminder emails to the delinquent Members.

# Automated Delinquencies: Reporting Homepage Tab

Once logged in, Members can navigate to their homepage and will land on their Reporting tab by default. A Page Banner automatically appears on the homepage if a Member has an overdue (delinquent) EHC Report.

## Page Banner:

If you have overdue reports, a message will be displayed here.

The screenshot shows the 'The Vault' reporting interface for GreenCycle Inc. A page banner at the top indicates 'You have overdue reports to be completed.' Below this, the 'Program Account Balance' is shown as \$904.00. The 'EHC Reports' table lists several reports, with the 'Jan-Dec 2023' report highlighted in green and labeled 'Delinquent'. The table has columns for Report, Report Type, Due Date, Status, and Manage.

Report	Report Type	Due Date	Status	Manage
October 2024 (Adj. v2)	EHC Report Adjustment	January 5, 2025	Approved	View
October 2024 (Adj. v1)	EHC Report Adjustment	January 5, 2025	Declined	View
October 2024	EHC Report	December 21, 2024	Adjusted	View
Jan-Dec 2023	EHC Report	August 1, 2024	Delinquent	Resolve

## Status:

As soon as the Delinquency Date of the EHC Report (or FRR) is reached, the status will be automatically moved to *Delinquent*.

## Starting an EHC Report:

When an EHC Report (or FRR) is ready for completion but past the due date, it will appear in the EHC Reports table with a status of "**Delinquent**". You can click "Resolve" in the Manage action column to begin filling out your EHC Report/FRR.

# Automated Delinquencies: **Thresholds for EHC Reports**

The following thresholds are used to determine when an EHC Report in The Vault is deemed *delinquent*.

## How EHC Due Dates are determined:

EHC Report Due Date = EHC Report Generation Date + 30 days

When there is an adjustment, the Adjustment Due Date is the latter of:

Current EHC Report Due Date + 15 days **OR** Today's Date + 15 days

## When are EHC Reports deemed delinquent:

EHC Report Delinquency Date is always **7 days after the EHC Report Due Date**



# Automated Delinquencies: **Thresholds for FRRs**

The following thresholds are used to determine when an FRR in The Vault is deemed *delinquent*.

## How FRR Due Dates are determined:

FRR Due Date = determined by the internal user generating the FRRs

When there is an adjustment, the Adjustment Due Date is the latter of:

Current FRR Due Date + 15 days **OR** Today's Date + 15 days

## When are EHC Reports deemed delinquent:

FRR Delinquency Date is always **7 days after the FRR Due Date**



# Automated Delinquencies: Program Account Balance Homepage Tab

When a Member navigates to their Program Account Balance homepage tab, a Page Banner automatically appears on the homepage if your organization has an overdue (delinquent) invoice.

The screenshot displays the 'Program Account Balance' tab for 'British Columbia Victoria Solutions' (Registration #: BC-0000181). The page shows a program account balance of \$84.00. Below this, there are sections for 'Program Account Statements', 'Invoices', and 'Payments and Refunds'. The 'Invoices' section contains a table with one invoice listed as 'Delinquent'.

Invoice Number	Invoice Name	Amount	Invoice Date	Status	Manage
00000213	Victoria Solutions Sep 2024 - Nov 2024	CASH4.00	December 4, 2024	Delinquent	

## Status:

As soon as the Due Date of the invoice passes, the status will be automatically moved to *Delinquent*.



# Automated Delinquencies: **Thresholds for Invoices**

The following thresholds are used to determine when an invoice in The Vault is deemed *delinquent*.

## How Invoice Due Dates are determined:

If the invoice generation date is on or before the EHC Report Due Date:

Invoice Due Date = EHC Report Due Date + 30 days

If the invoice generation date is after the EHC Report Due date:

Invoice Due Date = Invoice Generation Date

## When are invoices deemed delinquent:

Invoice Delinquency Date is always **Invoice Due Date + 1 day**

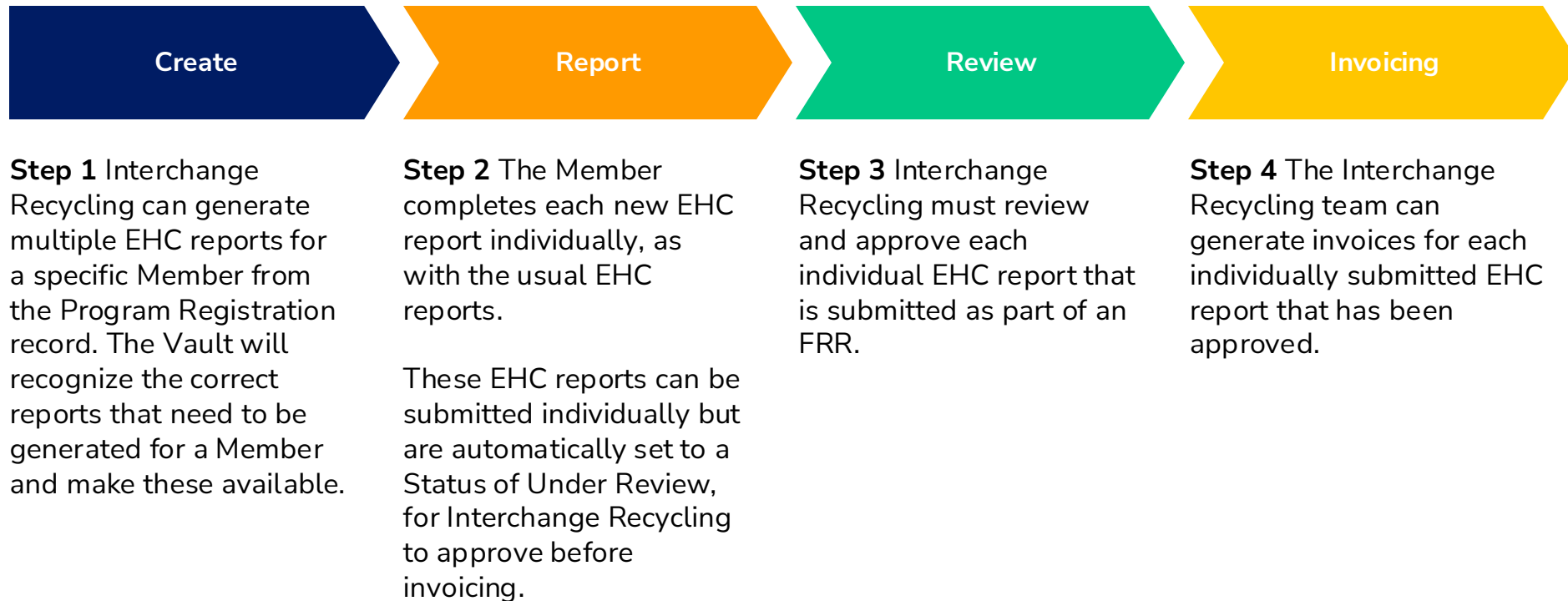


# First Remittance Report

When a Member creates an account and registers into relevant program(s), your supply start date will determine if you are a new Member or a free rider. When Interchange Recycling reviews your program registration they will decide if the Member needs to be issued past EHC Reports (First Remittance Report) to complete.

# First Remittance Reporting: Typical Flow

FRRs are used to 'catch up' a Member in their reporting requirements who may have missed reporting previously. Multiple individual reports can be created for a Member at once. They have a unique flow.



# First Remittance Report: Reporting Homepage Tab

An FRR will appear on the homepage as with other EHC Reports. They will be populated with a due date, and the actions available to them will depend on their Status.

## Page Banner:

If you have overdue reports, a message will be displayed here.

The screenshot shows the 'Reporting' tab of the 'The Vault' system. At the top, there is a banner with a warning icon and the text 'You have pending reports to be completed.' Below this is the 'Program Account Balance' section, which shows a balance of '\$0.00'. The main section is 'EHC Reports', which contains a table with the following data:

Report	Report Type	Due Date	Status	Manage
Sep 2024 - Nov 2024	EHC Report	January 2, 2025	Not Started	Start
Jan 2023 - Mar 2023	EHC Report	January 1, 2025	Not Started	Start
Apr 2023 - Jun 2023	EHC Report	January 1, 2025	Not Started	Start
Jul 2023 - Sep 2023	EHC Report	January 1, 2025	Not Started	Start
Oct 2023 - Dec 2023	EHC Report	January 1, 2025	Not Started	Start

At the bottom of the page, there is a footer with contact information for Interchange Recycling, including a phone number (+1.844.722.8662), an email address (admin@interchangerecycling.com), and social media icons.

## Starting an EHC Report:

When a FRR is ready for completion, it will appear in the EHC Reports table with a status of "Not Started". You can click "Start" in the Manage action column to begin filling out your FRRs for past reporting periods.

# Financing and Invoicing

Invoices are generated based on the data submitted by a Member on an EHC Report or an FRR. If an EHC Report or FRR is adjusted, an invoice may be issued to accommodate for the adjustment. Invoices can also be generated on an ad hoc basis by Interchange Recycling.

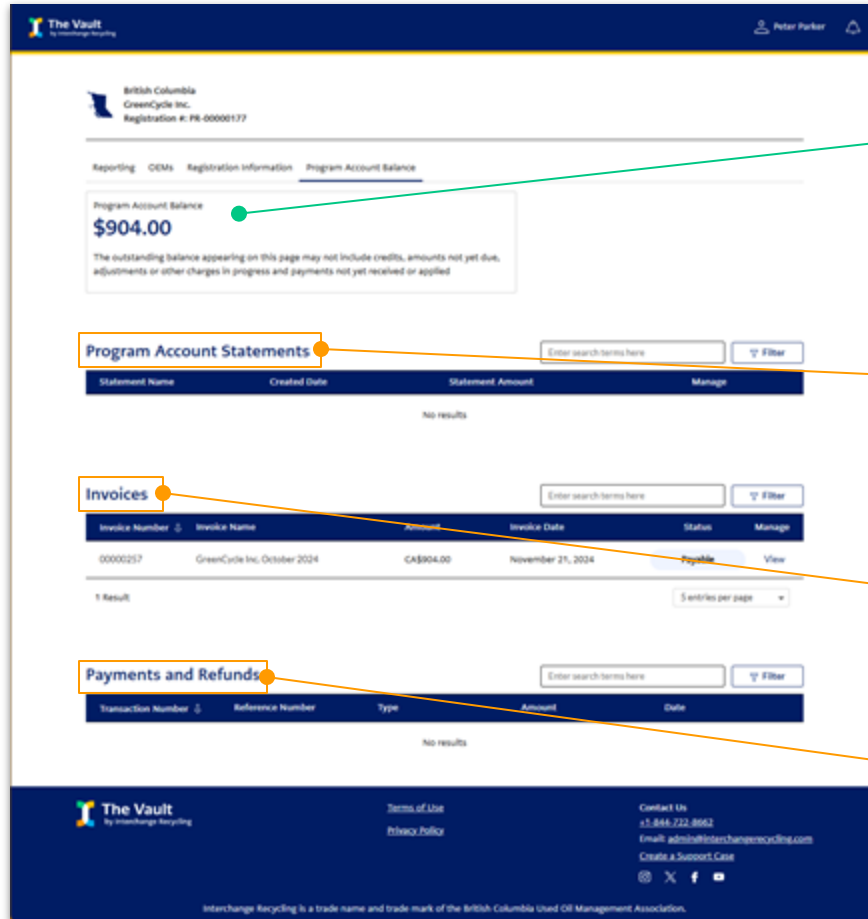
# Finance & Invoicing: **Types of Invoices**

There are several different types of invoices that will be generated in The Vault.

Types	Use Cases	Invoice Generation Method
<b>EHC Report</b>	When a Member submits an EHC Report.	Automatic upon submission
<b>EHC Report Adjustment</b>	When an adjustment is made to an EHC Report and approved by Interchange Recycling.	Manual after approval
<b>FRRs</b>	When a Member submits an FRR, and it is approved by Interchange Recycling.	Manual after approval
<b>Ad Hoc</b>	When Interchange Recycling wants to issue an invoice for any other ad hoc reasons.	Manual

# Finance & Invoicing: Program Account Balance Homepage Tab

The Program Account Balance is a tab on the homepage that Members can access.



## Program Account Balance = Opening Balance + Invoices - Payments and Credits

Members are encouraged to review the Program Account Balance when paying invoices to ensure you are not making overpayments by looking at individual invoice balances instead of adjusted balances.

## Program Account Statements

Monthly generated snapshot in time of the amount a Member owes Interchange Recycling (or, in some instances, that Interchange Recycling owes to a Member). It also includes any delinquent reports or invoices. Statements are provided on the 15<sup>th</sup> of the following month for the month prior.

## Invoices

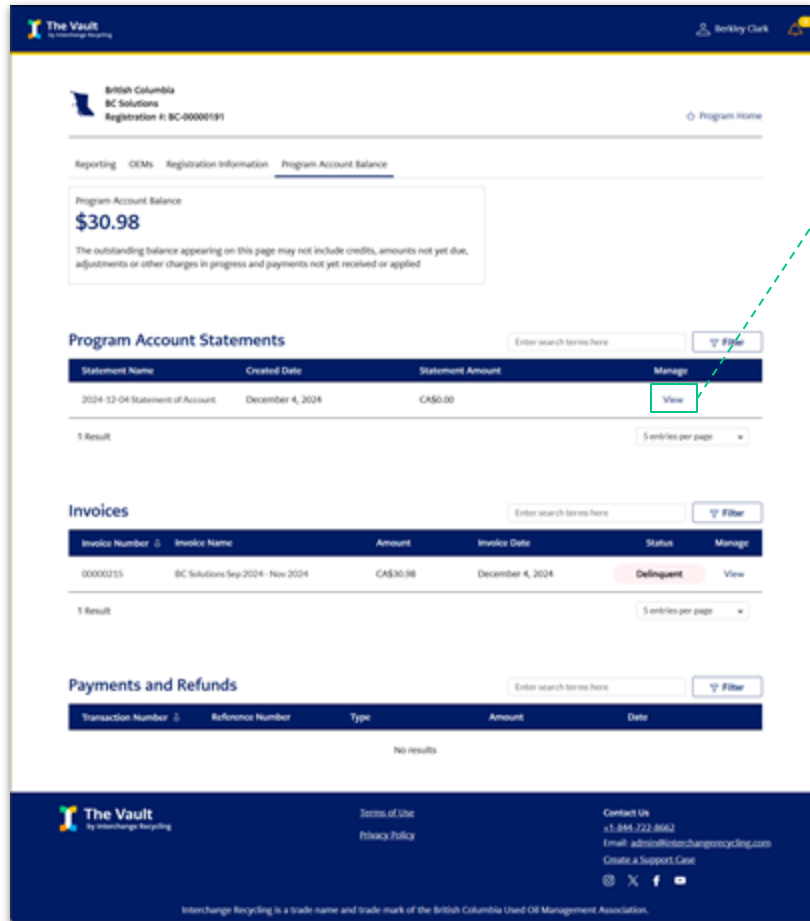
Fees generated automatically or manually by Interchange Recycling that can be associated with a submitted EHC Report, a penalty, etc. These are associated with an Account over time.

## Payments and Credits

Transactions (payment and credits) associated with an Account over time.

# Finance & Invoicing: Viewing a Program Account Statement

The details of each Program Account Statement can be viewed directly from The Vault.



The screenshot shows the 'Program Account Balance' page in The Vault. At the top, it displays 'British Columbia BC Solutions Registration #: BC-0000191'. Below this, the 'Program Account Balance' is shown as '\$30.98'. A note states: 'The outstanding balance appearing on this page may not include credits, amounts not yet due, adjustments or other charges in progress and payments not yet received or applied.' There are three main sections: 'Program Account Statements', 'Invoices', and 'Payments and Refunds'. The 'Program Account Statements' section contains a table with one entry: '2024-12-04 Statement of Account' with a 'Created Date' of 'December 4, 2024' and a 'Statement Amount' of 'CAD\$0.00'. A 'View' button is highlighted with a green box. The 'Invoices' section shows one invoice: '00000155' for 'BC Solutions Sep-2024 - Nov-2024' with an amount of 'CAD\$0.98' and a status of 'Delinquent'. The 'Payments and Refunds' section is currently empty.



The screenshot shows the 'Program Statement' page in The Vault. It displays 'British Columbia BC Solutions Registration #: BC-0000191'. The 'Program Statement' is for 'December 4, 2024' with a 'Program Balance As Of December 4, 2024' of '\$30.98'. There are three main sections: 'Payments and Refunds', 'Outstanding Invoices', and 'Outstanding Reports'. The 'Payments and Refunds' section is empty. The 'Outstanding Invoices' section shows one invoice: '00000155' for 'BC Solutions Sep-2024 - Nov-2024' with an amount of 'CAD\$0.98'. The 'Outstanding Reports' section shows one report: 'Apr-2024 - Jun-2024' for 'Ready Report' with a date of 'November 6, 2024'. A 'Generate PDF' button is highlighted with an orange box and an arrow pointing to the text 'Generate PDF: Download the invoice as a PDF from The Vault.' The page also includes a footer with contact information and a note about Interschange Recycling.

**Generate PDF:**  
Download the invoice  
as a PDF from The  
Vault.



# Finance & Invoicing: Viewing an Invoice

The details of each invoice can be viewed directly from The Vault.

The screenshot shows the 'Program Account Balance' section with a balance of \$904.00. Below this, there are sections for 'Program Account Statements', 'Invoices', and 'Payments and Refunds'. The 'Invoices' section contains a table with one entry: Invoice Number 0000257, Invoice Name GreenCycle Inc, October 2024, Amount CA\$904.00, Invoice Date November 21, 2024, and Status Payable. A green box highlights the 'View' button next to this invoice.

The detailed invoice view includes a 'Generate PDF' button highlighted with an orange box and an arrow pointing to the text 'Generate PDF: Download the invoice as a PDF from The Vault.' The 'Sales Data' section contains three tables:

OEM Name	Products	Unit Price	Units	Price
Passenger Vehicles	Motor or Lubricating Oils (S1.0 / 1.2 x 4 units) AF Concentrate (S1.0 / 1.2 x 4 units) AF Oil (S1.0 / 1.2 x 1 units)	\$19 / GAH	10	CA\$190.00
Custom OEM's	Motor or Lubricating Oils (S1.0 / 1.2 x 4 units) Filter (each item (S1.0 / 1.2) x 1 units)	\$30 / GAH	10	CA\$300.00
Total			20	CA\$490.00

Product	Code	Unit Price	Units	Price
Motor or Lubricating Oils	Oil	\$17.5	10	CA\$175.00
Total			10	CA\$175.00

Product	Code	Unit Price	Units	Price
AF Concentrate	AFCONC	\$17.5	10	CA\$175.00
AF Oil	AF OIL	\$17.5	10	CA\$175.00
AF Concentrate (Litre)	AFCONL	\$17.5	10	CA\$175.00
Total			30	CA\$525.00

Product	Unit Price	Units	Price
AF Concentrate (5PT) (Litre)	\$17.5	10	CA\$175.00
Total		10	CA\$175.00

**Generate PDF:**  
Download the invoice as a PDF from The Vault.

# Communications

Users will receive targeted communications based on the departments they are tagged to in their registered Programs. Communications are either emails or new bell notifications that display in The Vault to alert a Member of a pending action item.

# Communications: Navigation Menu

From the Navigation Menu, you can access the Communications Centre by clicking on “My Communications”.

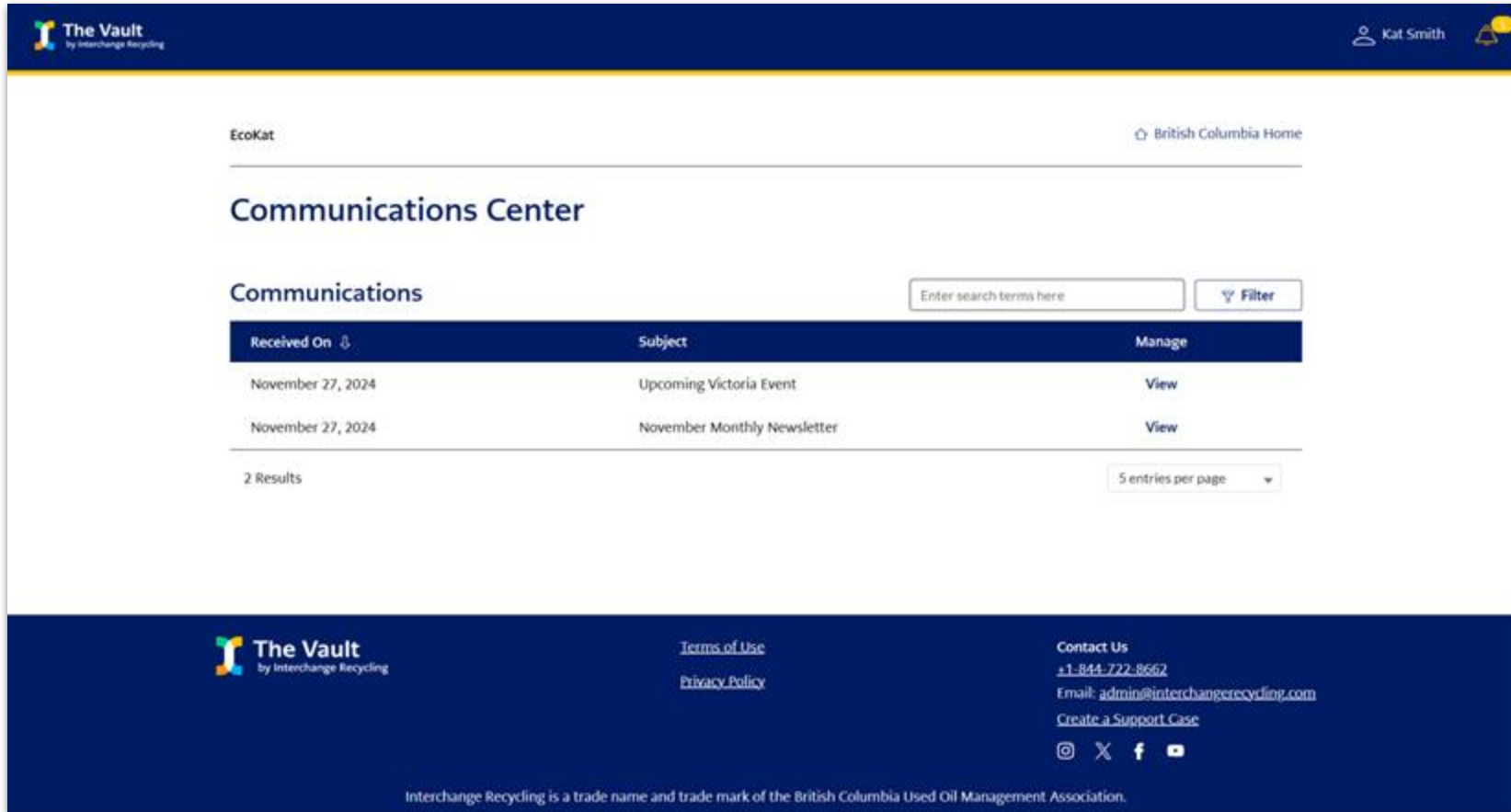
The screenshot displays the 'The Vault' user interface. At the top left is the logo 'The Vault By Interchange Recycling'. The user's name 'Peter Parker' and a notification bell are in the top right. A dropdown navigation menu is open, listing: Role Dashboard, Program Dashboard, Manage Users, My Communications, My Support Cases, and Logout. The main content area shows 'British Columbia GreenCycle Inc. Registration #: PR-00000177'. Below this are tabs for Reporting, OEMs, Registration Information, and Program Account Balance. The 'Program Account Balance' section shows '\$0.00' with a note: 'The outstanding balance appearing on this page may not include credits, amounts not yet due, adjustments or other charges in progress and payments not yet received or applied'. At the bottom, there is an 'EHC Reports' section with a search bar and a 'Filter' button. A table header is visible with columns: Report, Report Type, Due Date, Status, and Manage. The table currently shows 'No results'.

## Navigation Menu:

- **Role Dashboard:** Takes you to the Role Selection page to register in a new Role or access all your current registered Roles.
- **Program Dashboard:** Allows you to access the Program Selection page to register in a new Program and access all your registered Programs.
- **Manage Users:** This is only visible for Account and Program Administrators and allows for managing which users can access The Vault on your organization's behalf.
- **My Communications:** Displays previously sent communications to the user account.
- **My Support Cases:** You can view submitted Support Cases and check the status.

# Communications: **Communications Centre**

This page showcases communications a user has received in The Vault.



The screenshot displays the 'Communications Center' interface within 'The Vault' system. At the top left is the logo for 'The Vault by Interchange Recycling'. The user's name 'Kat Smith' and a notification bell icon are in the top right. Below the header, the user 'EcoKat' is identified, with a 'British Columbia Home' link. The main heading is 'Communications Center'. A search bar with the placeholder 'Enter search terms here' and a 'Filter' button are positioned above a table. The table has three columns: 'Received On', 'Subject', and 'Manage'. It lists two items: 'November 27, 2024' for 'Upcoming Victoria Event' and 'November 27, 2024' for 'November Monthly Newsletter'. Below the table, it shows '2 Results' and a '5 entries per page' dropdown. The footer contains the company logo, links for 'Terms of Use' and 'Privacy Policy', contact information including phone number '+1-844-722-8662' and email 'admin@interchangerecycling.com', and social media icons for Instagram, X, Facebook, and YouTube. A disclaimer at the bottom states: 'Interchange Recycling is a trade name and trade mark of the British Columbia Used Oil Management Association.'

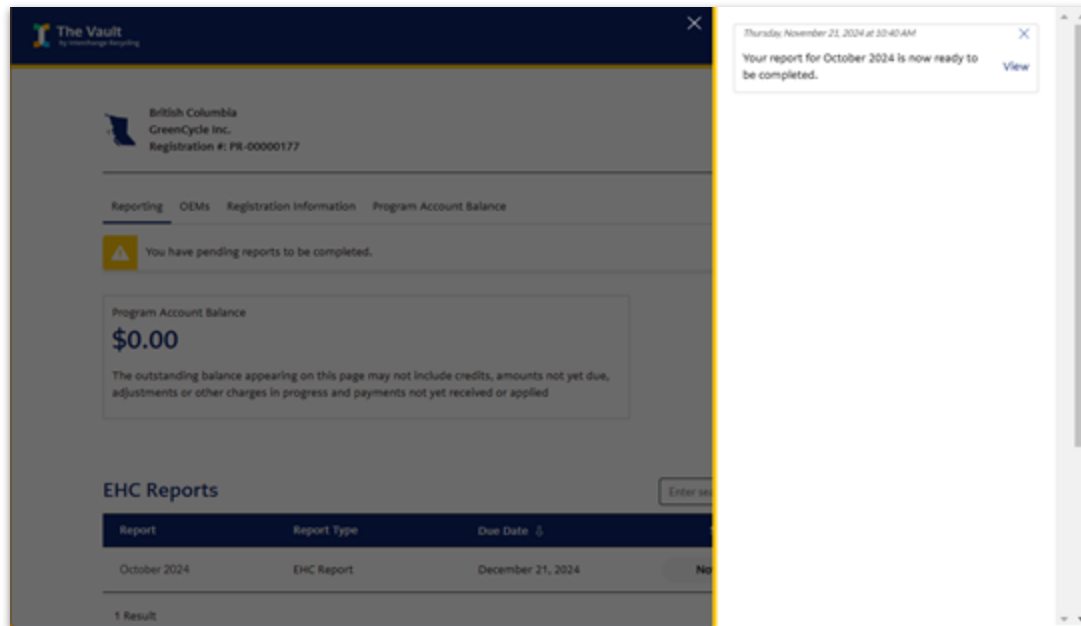
# Summary of Communications

Communication	Notifications		Frequency	Departments Receiving the Communications						
	Email	Portal Bell		Account Admin	Program Admin	Finance	Operations	Marketing	Administration	Environmental/Sustainability
Password Setup/Reset Instructions	✓		Once - after Account Creation	✓	✓	✓	✓	✓	✓	✓
<a href="#">EHC Report is Ready To Be Completed</a>	✓	✓	Once - after EHC Report generation	✓	✓	✓	✓	○	✓	○
<a href="#">EHC Report is Due in 5 Days</a>	✓	✓	Once - Five (5) days before the EHC Report due date	✓	✓	✓	✓	○	✓	○
<a href="#">EHC Report is Past Due</a>	✓	✓	Day that the EHC Report becomes delinquent and every fifteen (15) business days after the due date; ends when the EHC Report is successfully submitted.	✓	✓	✓	✓	○	✓	○
<a href="#">EHC Report Adjustment is Triggered by Interchange Recycling</a>	✓	✓	Once - after the EHC Report Adjustment has been created by Interchange Recycling.	✓	✓	✓	✓	○	✓	○
<a href="#">EHC Report Adjustment is Rejected by Interchange Recycling</a>	✓	✓	Once - after an EHC Report Adjustment has been <i>rejected</i> by Interchange Recycling.	✓	✓	✓	✓	○	✓	○
<a href="#">EHC Report Adjustment is Approved by Interchange Recycling</a>	✓	✓	Once - after an EHC Report Adjustment has been <i>approved</i> by Interchange Recycling.	✓	✓	✓	✓	○	✓	○
<a href="#">Invoice is Past Due</a>	✓	✓	Day that the invoice becomes delinquent and every fifteen (15) business days after the due date; ends when the invoice is marked as paid.	✓	✓	✓	✓	○	✓	○

# Communications: EHC Report Ready To Be Completed

The following email and bell notification is received when an EHC Report to complete.

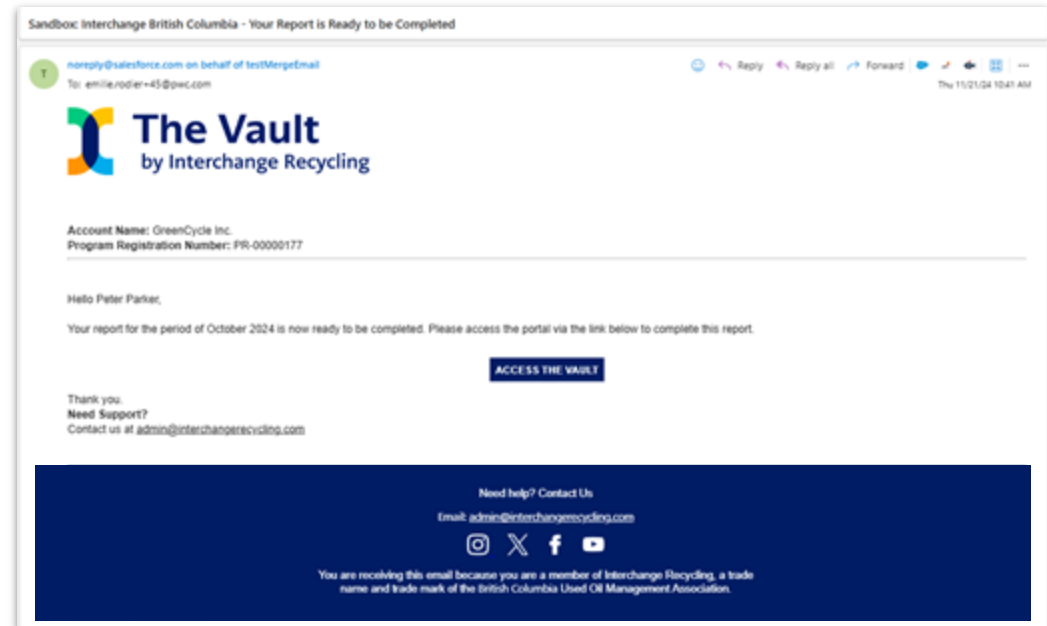
Portal Bell Notification



The screenshot shows the 'The Vault' portal interface. At the top, it identifies the user as 'British Columbia GreenCycle Inc.' with registration number 'PR-0000177'. A notification bell icon is highlighted with a yellow border, displaying a message: 'Your report for October 2024 is now ready to be completed.' Below this, the 'Program Account Balance' is shown as '\$0.00'. At the bottom, there is a table titled 'EHC Reports' with the following data:

Report	Report Type	Due Date
October 2024	EHC Report	December 21, 2024

Email Notification

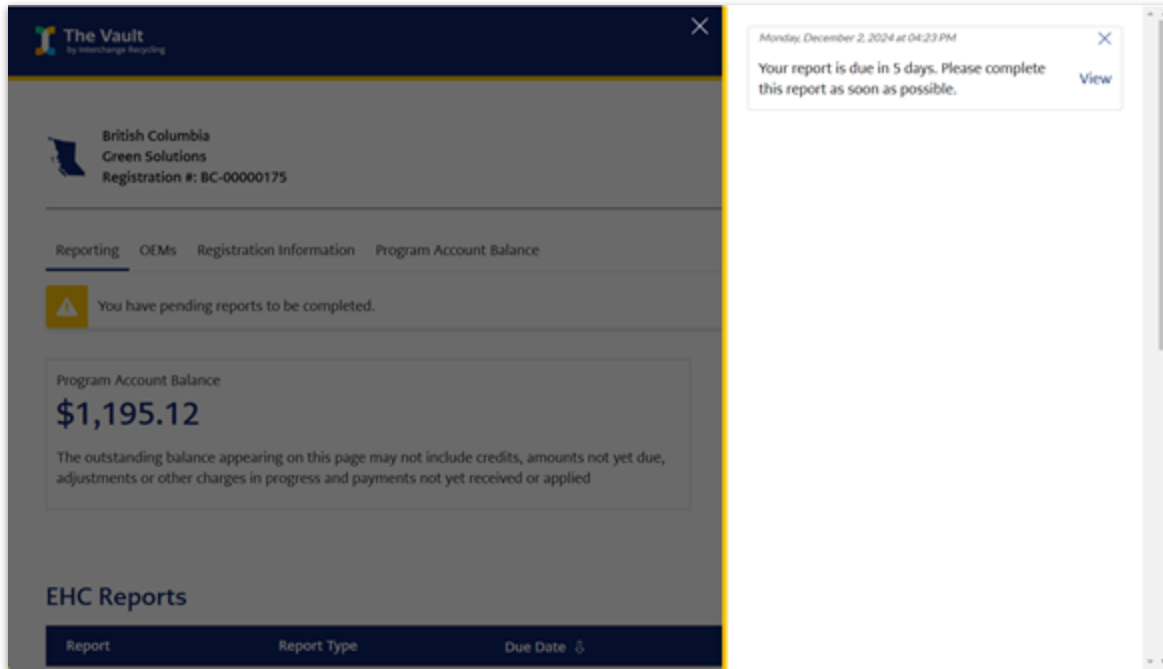


The screenshot shows an email notification from 'The Vault by Interchange Recycling'. The subject is 'Sandbox: Interchange British Columbia - Your Report is Ready to be Completed'. The email body includes the account name 'GreenCycle Inc.' and registration number 'PR-0000177'. It addresses 'Peter Parker' and states: 'Your report for the period of October 2024 is now ready to be completed. Please access the portal via the link below to complete this report.' A prominent blue button labeled 'ACCESS THE VAULT' is provided. The footer contains contact information for support and social media icons.

# Communications: EHC Report is Due in Five Days

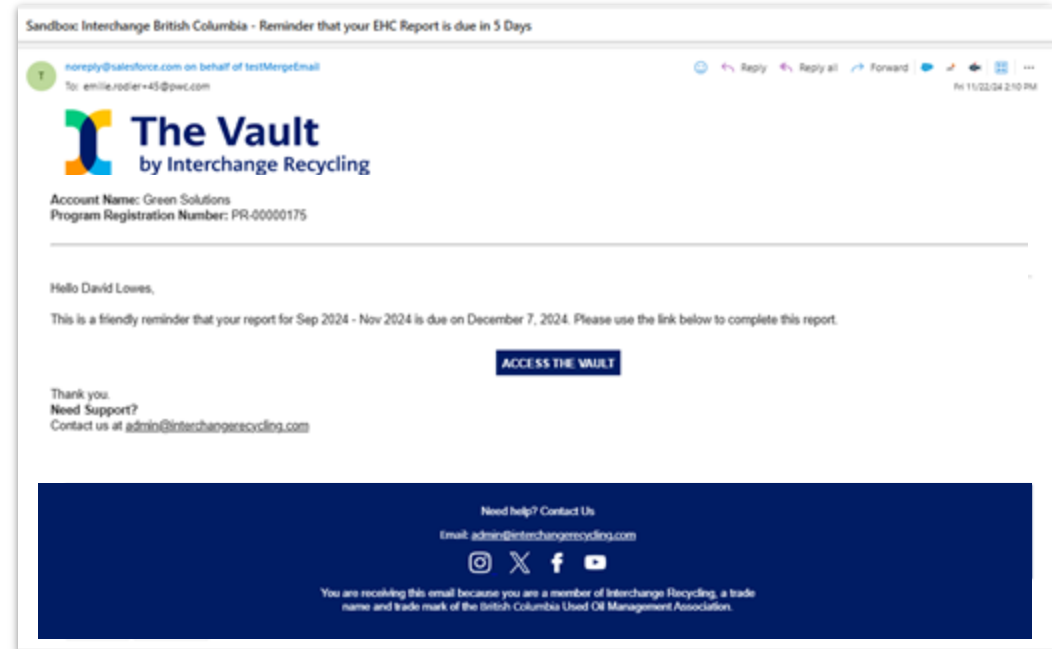
The following email and bell notification is received when an EHC Report due in five days.

Portal Bell Notification



The screenshot shows a notification bell in a web portal. The notification text reads: "Monday, December 2, 2024 at 04:23 PM. Your report is due in 5 days. Please complete this report as soon as possible." The background shows the portal interface with the logo "The Vault by Interchange Recycling" and account information for "British Columbia Green Solutions" with registration number "BC-0000175". A warning icon indicates "You have pending reports to be completed." Below this, the "Program Account Balance" is listed as "\$1,195.12". At the bottom, there is a section for "EHC Reports" with a table header containing "Report", "Report Type", and "Due Date".

Email Notification



The screenshot shows an email notification with the subject "Sandbox: Interchange British Columbia - Reminder that your EHC Report is due in 5 Days". The sender is "noreply@salesforce.com on behalf of testMergeEmail" to "emilie.rodiere+45@pwc.com". The email content includes the logo "The Vault by Interchange Recycling", account name "Green Solutions", and program registration number "PR-0000175". The message says: "Hello David Lowes, This is a friendly reminder that your report for Sep 2024 - Nov 2024 is due on December 7, 2024. Please use the link below to complete this report." A button labeled "ACCESS THE VAULT" is provided. The email concludes with "Thank you. Need Support? Contact us at admin@interchangerecycling.com". The footer contains social media icons and a disclaimer: "Need help? Contact Us Email: admin@interchangerecycling.com. You are receiving this email because you are a member of Interchange Recycling, a trade name and trade mark of the British Columbia Used Oil Management Association."

# Communications: EHC Report is Past Due

The following email and bell notification is received when an EHC Report past its due date.

Portal Bell Notification

The screenshot shows the 'The Vault' portal interface. At the top, it identifies the user as 'British Columbia GreenCycle Inc.' with registration number 'PR-00000177'. A red warning icon indicates 'You have overdue reports to be completed.' Below this, the 'Program Account Balance' is shown as '\$904.00'. A table titled 'EHC Reports' lists an overdue report for 'October 2024 (Adj, v2)' with a due date of 'January 5, 2025'. A bell notification overlay on the right side of the screen displays three messages: 'Your report for Jan - Dec 2023 is now past due. Please complete this report as soon as possible to avoid additional fees.', 'Your adjustment for October 2024 (Adj, v2) has been approved.', and 'Your adjustment for October 2024 (Adj, v1) has been declined.' Each notification includes a 'View' link.

Email Notification

The screenshot shows an email notification from 'The Vault by Interchange Recycling'. The subject is 'Sandbox: Interchange British Columbia - Your EHC Report is Past Due'. The sender is 'noreply@salesforce.com on behalf of testMergeEmail' to 'emilie.rodier+45@pwc.com'. The email body includes the account name 'GreenCycle Inc.' and registration number 'PR-00000177'. It addresses 'Peter Parker' and states 'Your report for the period of Jan - Dec 2023 is now past due. Please access the portal via the link below to complete this report as soon as possible.' A prominent blue button labeled 'ACCESS THE VAULT' is provided. The email concludes with a thank you and support contact information: 'Thank you. Need support? Contact us at admin@interchangerecycling.com'. A footer contains social media icons and a disclaimer: 'You are receiving this email because you are a member of Interchange Recycling, a trade name and trade mark of the British Columbia Used Oil Management Association.'



# Communications: Adjustment Ready To Be Completed

The following email and bell notification is received when an EHC Report adjustment to complete.

Portal Bell Notification

The screenshot shows the 'The Vault' portal interface. At the top, it identifies the user as 'British Columbia GreenCycle Inc.' with registration number 'PR-00000177'. A notification bell icon is active, showing two notifications: 'Your EHC Report adjustment for October 2024 (Adj. v1) is now ready to be completed.' and 'Your report for October 2024 is now ready to be completed.' Below the notifications, the 'Program Account Balance' is displayed as '\$904.00'. A table titled 'EHC Reports' shows a report for 'October 2024 (Adj. v1)' with a due date of 'January 5, 2025'.

Report	Report Type	Due Date
October 2024 (Adj. v1)	EHC Report Adjustment	January 5, 2025

Email Notification

The email notification is titled 'Sandbox: Interchange British Columbia - Your EHC Report Adjustment is Ready to Be Completed'. It is addressed to 'emilie.rodier+45@pwc.com'. The email body includes the account name 'GreenCycle Inc.' and registration number 'PR-00000177'. It greets Peter Parker and states that the EHC Report adjustment for October 2024 (Adj. v1) is ready to be completed. A button labeled 'ACCESS THE VAULT' is provided. The email concludes with contact information for support and social media links.

# Communications: Adjustment Rejected

The following email and bell notification is received when an EHC Report adjustment has been rejected.

Portal Bell Notification

The screenshot shows the 'The Vault' portal interface. On the left, the user's account information is displayed: British Columbia, GreenCycle Inc., Registration #: PR-00000177. Below this, there are tabs for Reporting, OEMs, Registration Information, and Program Account Balance. A warning icon indicates 'You have pending reports to be completed.' The Program Account Balance is shown as \$904.00. At the bottom, there is a table for EHC Reports.

Report	Report Type	Due Date
October 2024 (Adj. v2)	EHC Report Adjustment	January 5, 2025

On the right, a bell notification dropdown is open, showing three messages:

- Friday, November 22, 2024 at 01:18 PM: Your adjustment for October 2024 (Adj. v1) has been declined. View
- Friday, November 22, 2024 at 01:18 PM: Your EHC Report adjustment for October 2024 (Adj. v2) is now ready to be completed. View
- Friday, November 22, 2024 at 01:07 PM: Your report for Aug 2024 - Oct 2024 is now ready to be completed. View

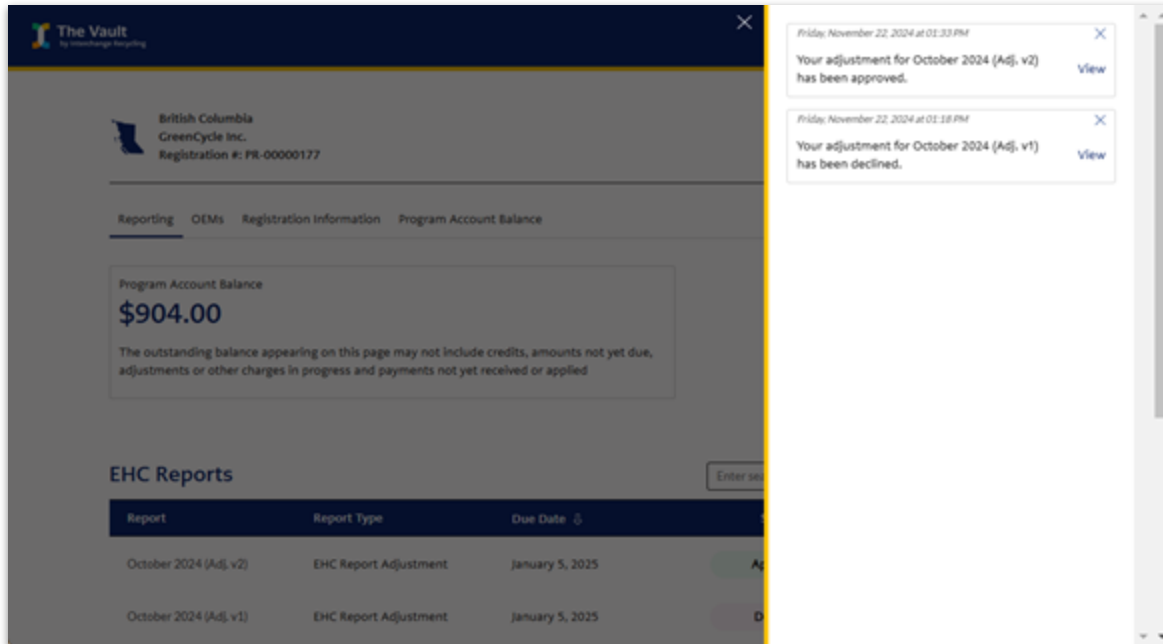
Email Notification

The screenshot shows an email notification from 'The Vault by Interchange Recycling'. The subject is 'Sandbox: Interchange British Columbia - Your Adjustment Request has been Declined'. The email is from 'noreply@salesforce.com on behalf of testMergeEmail' to 'emilerodier+45@pwc.com'. The account name is GreenCycle Inc. and the program registration number is PR-00000177. The email body says: 'Hello Peter Parker, Your adjustment request for the period of October 2024 (Adj. v1) has been declined. Please access the portal via the link below to complete an adjustment.' There is a button labeled 'ACCESS THE VAULT'. The email concludes with 'Thank you. Need Support? Contact us at admin@interchangerecycling.com'. The footer includes social media icons and a disclaimer: 'You are receiving this email because you are a member of Interchange Recycling, a trade name and trade mark of the British Columbia Used Oil Management Association.'

# Communications: Adjustment Approved

The following email and bell notification is received when an EHC Report adjustment has been approved.

Portal Bell Notification



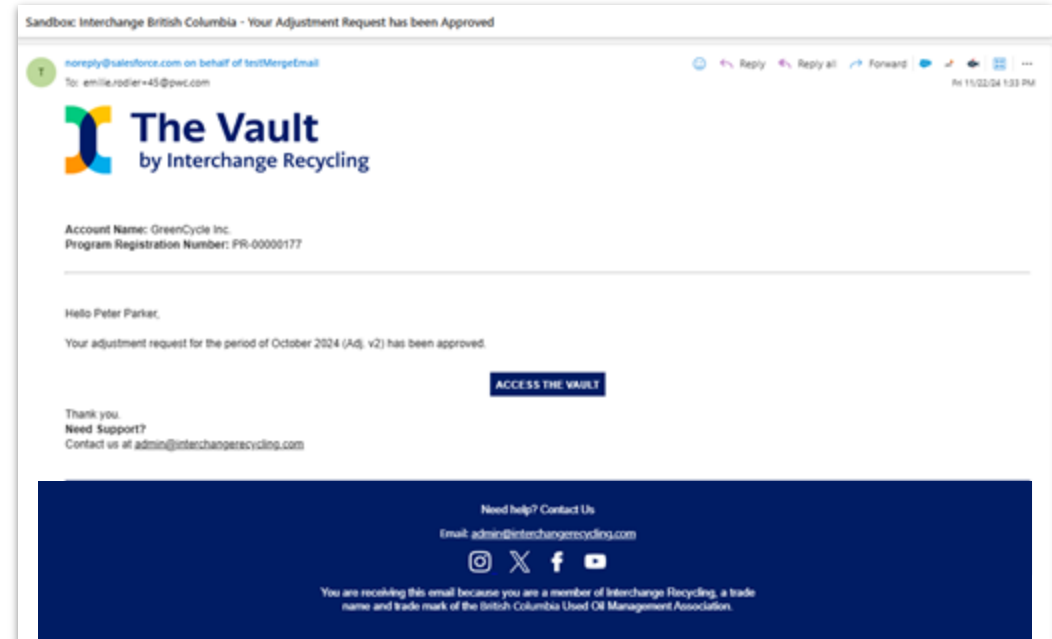
The screenshot shows the 'The Vault' portal interface. On the left, the user's account information is displayed: British Columbia, GreenCycle Inc., Registration #: PR-00000177. Below this, the 'Program Account Balance' is shown as \$904.00. A section titled 'EHC Reports' contains a table with the following data:

Report	Report Type	Due Date
October 2024 (Adj, v2)	EHC Report Adjustment	January 5, 2025
October 2024 (Adj, v1)	EHC Report Adjustment	January 5, 2025

On the right, a bell notification dropdown is open, showing two messages:

- Friday, November 22, 2024 at 01:33 PM: Your adjustment for October 2024 (Adj, v2) has been approved. [View]
- Friday, November 22, 2024 at 01:18 PM: Your adjustment for October 2024 (Adj, v1) has been declined. [View]

Email Notification



The screenshot shows an email notification from 'The Vault by Interchange Recycling'. The subject is 'Sandbox: Interchange British Columbia - Your Adjustment Request has been Approved'. The email is addressed to emilie.rodier+45@pwc.com. The body of the email includes the account name 'GreenCycle Inc.' and program registration number 'PR-00000177'. It says 'Hello Peter Parker, Your adjustment request for the period of October 2024 (Adj, v2) has been approved.' and includes a button labeled 'ACCESS THE VAULT'. At the bottom, there is a footer with social media icons and contact information: 'Need help? Contact Us Email: admin@interchangerecycling.com'. A disclaimer at the very bottom states: 'You are receiving this email because you are a member of Interchange Recycling, a trade name and trade mark of the British Columbia Used Oil Management Association.'

# Communications: Invoice is Past Due

The following email and bell notification is received when an Invoice is past its due date.

Portal Bell Notification

The screenshot shows the 'The Vault' portal interface. At the top, there is a notification bell icon with a 'View' button. The notification text reads: 'Wednesday, December 4, 2024 at 09:48 AM. Your British Columbia Invoice Victoria Solutions Sep 2024 - Nov 2024 is now past due with an outstanding balance of \$84.00. Please pay the outstanding balance as soon as possible.' Below the notification, the portal displays the account name 'British Columbia Victoria Solutions' and registration number 'BC-0000181'. A warning icon indicates 'You have pending reports to be completed.' The 'Program Account Balance' is shown as '\$84.00'. Below this, there is a section for 'EHC Reports' with a table listing reports for 'Sep 2024 - Nov 2024' with a due date of 'January 2, 2025'.

Email Notification

The screenshot shows an email notification from 'The Vault by Interchange Recycling'. The subject line is 'Sandbox: Your British Columbia Invoice Victoria Solutions Sep 2024 - Nov 2024 is Past Due'. The email body includes the account name 'Victoria Solutions' and program registration number 'PR-0000181'. It addresses 'Marin Ward' and states: 'Your British Columbia Invoice Victoria Solutions Sep 2024 - Nov 2024 is now past due with an outstanding balance of CAD \$4.00. Please access the portal via the link below to pay the outstanding balance as soon as possible.' A button labeled 'ACCESS THE VAULT' is provided. The email concludes with contact information for support and social media icons. A footer note states: 'You are receiving this email because you are a member of Interchange Recycling, a trade name and trade mark of the British Columbia Used Oil Management Association.'



[interchangerecycling.com](http://interchangerecycling.com) | [memberservices@interchangerecycling.com](mailto:memberservices@interchangerecycling.com)