



Supplier Portal – Master Data (For Suppliers)

*Click the **Start** button to begin the course!*

Start

Course Navigation Instructions

Let us look at how to navigate through this course.

The screenshot shows a presentation slide titled "Module Objectives" with the Apollo logo in the top right. The slide content includes the text "After completing this module, you will be able to:" followed by two bullet points: "Describe the Supplier Portal" and "Navigate through the Supplier Portal". At the bottom of the slide, there is a "MAIN MENU" button, a "Previous" navigation icon (two left-pointing arrows), and a "Next" navigation icon (two right-pointing arrows). The Constellation logo is in the bottom right corner of the slide. Three callout boxes provide instructions: one for the "MAIN MENU" button, one for the "Previous" icon, and one for the "Next" icon.

Module Objectives

After completing this module, you will be able to:

- Describe the Supplier Portal
- Navigate through the Supplier Portal

Use the Main Menu button to return to the list of contents.

Use the Previous icon to navigate to the previous slide

Use the Next icon to navigate to the next slide



Course Details

Welcome to the Supplier Portal – Master Data (for Suppliers) course!



This course will provide an overview of the supplier portal and will help you navigate the supplier portal. It will provide information on updating supplier profile details in Supplier Portal, it will also provide an overview of the approval process for profile updates. Additionally, it will guide you on how to Upload documents in the Supplier Portal.



It will take approximately 20 minutes to complete this course.



Course Objectives

At the end of this course, you will be able to:

- Describe and navigate the supplier portal
- Update profile in the Supplier Portal
- Discuss the steps to request for approval of profile updates
- Upload documents in the Supplier Portal



Key Terms

The key terms used in this course are listed below:

Key Term	Description
Supplier	Supplier refers to an entity or individual that provides goods or services to a company or organization.
Supplier Portal	The Supplier Portal page serves as the landing page for Oracle Supplier Portal and provides quick access to tasks and reports relevant to you.
1099 Supplier	The IRS 1099 Form is a collection of tax forms documenting different types of payments made by an individual or a business that typically isn't your employer. The payer fills out the form with the appropriate details and sends copies to you and the IRS, reporting payments made during the tax year.
Alternate Name	Vendor "AKA" or "Also Known As" different from DBA.
Business Classification	The Oracle term for identifying diversity classes.
Business Unit	Power and Nuclear are examples of Business Units.



Key Terms

The key terms used in this course are listed below:

Key Term	Description
Constellation Point of Contact	When registering, use this field to declare a contact inside of Constellation who you have a relationship with.
DBA/ Doing Business As	A name an entity uses to conduct business which is a different name than the entity's legal one. This name would be shown on Line 2 of the W9.
BU	Business Unit. A business unit is a unit of an enterprise that performs one or many business functions that can be rolled up in a management hierarchy.
Certifying Agency	An agency approved or authorized to gather required documentation to issue or maintain a certificate. In Oracle this refers to an agency which issues or grants diversity designations to a company.
CFS	The Constellation Financial System.
EDI	Electronic Data Interface If <code>VENDOR_EDI_IND</code> is "Y," then Enable B2B Messaging. Communication (email) details for EDI suppliers.



Key Terms

The key terms used in this course are listed below:

Key Term	Description
ERP	Enterprise Resource Planning. ERP is business process management software that allows an organization to use a system of integrated applications to manage the business and automate many back-office functions related to technology, services, and human resources.
FBDI	File Based Data Import. FBDI is an excel based template used to collect your cleansed supplier details.
Legal Entity	A legal entity is a recognized party with rights and responsibilities given by legislation. Examples: <ul style="list-style-type: none">• Ginna Nuclear Power Plant• Distrigas Of Massachusetts LLC• Constellation Mystic Pwr LLC• Constellation Exelon Powerlabs, LLC• Calvert Cliffs Nuclear Plant• Constellation Power Source Gen• EXELON WIND, LLC



Key Terms

The key terms used in this course are listed below:

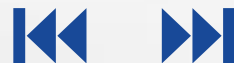
Key Term	Description
Legal Structure	The legal structure field is used to declare certain tax arrangements a company may have such as one which deems the company a charity, such as a 501c3 company, labor union, financial institution, or trade association.
Multi-factor authentication	When you sign into your online account you must prove you are who you say you are. Constellation requires "Two-Step Verification" or "Multifactor Authentication" for logging in and for password resets.
Payment Methods	Payment methods we offer are ACH, check, Wire and VCC.
PII/ Personally Identifiable Information	A set of data that can identify an individual uniquely or indirectly. PI may include social security number, federal employer identification number, tax registration number or bank account information.
Remittance Advice	Remittance advice is a document that confirms a payment to a supplier or a vendor.
Remit-To Address	This is the address payments are sent to. This address may be different from a company's official address.



Key Terms

The key terms used in this course are listed below:

Key Term	Description
SIC Code	Found in the Additional Information area in the General Profile (vs SIC on Organization Tab).
Social Security number	A Social Security number (SSN) is an identification number used by the Internal Revenue Service (IRS) in the administration of tax laws. SSNs are issued by the Social Security Administration.
SRA	Security Risk Assessment: In cases where a procurement request is for a NERC-CIP product or service or an IT purchase that involves the exchange of Restricted Confidential or Confidential Information (per LE-AC-301), the Supplier will be asked to respond to a Security Risk Assessment.
Supplier Number	Supplier Number is a system-generated nine-digit number beginning with 9 assigned to a distinct Supplier TIN and Supplier Name.
Tax Registration Number	A foreign taxpayer identification number. Oracle allows for foreign tax ids to be used in cases where foreign taxpayers do not have an American TIN.



Key Terms

The key terms used in this course are listed below:

Key Term	Description
Supplier Type	<ul style="list-style-type: none">• Supply Suppliers - “Supply” suppliers require Purchase Orders (PO) and Contracts to create invoices against for payment.• Voucher Suppliers - Voucher suppliers register as payment-only suppliers. We typically use this type of supplier to pay for speaker fees or make donations to political groups. Voucher Suppliers cannot charge sales taxes. These suppliers need to complete a Vendor Affiliation with Public Officials Questionnaire (VAQ).• Voucher Exempt Suppliers - Voucher Exempt suppliers register as payment-only suppliers. Payments to Voucher Exempt suppliers are deemed exempted from filling in the Vendor Affiliation with Public Officials Questionnaire (VAQ). We typically use this type of supplier to pay for taxes, insurance, and rent. See appendix, No VAQ required.
Supplier Header/ Global Supplier Master	There are certain elements that are global in nature and will be across all supplier sites. This is the global section of the supplier. Header profile elements are the main sections that have additional content, but they stand by themselves. Business Classifications, Products and Services, etc.



Key Terms

The key terms used in this course are listed below:

Key Term	Description
TIN	“Taxpayer Identification Number,” A Taxpayer Identification Number (TIN) is an identification number used by the Internal Revenue Service (IRS) in the administration of tax laws. It is issued either by the Social Security Administration (SSA) or by the IRS. Nonresident and resident aliens, their spouses, and dependents who cannot get a Social Security Number (SSN) are eligible for this type of ID.
Tax Organization Type	Used to specify the type of business of a supplier such as Corporation, Partnership, Individual, etc. This must match with what is listed on the respective W9 form.
FEIN	Federal Employee Identification Number: A FEIN is an identification number issued to businesses by the Internal Revenue Service (IRS) and used by the IRS in the administration of tax laws.
VCC payment method	“Virtual Credit Card” this payment method promises accelerated terms for faster payment of our invoices. Suppliers register with our VCC provider, are alerted when a payment has been made then log in to our provider’s website to claim the funds.



Key Terms

The key terms used in this course are listed below:

Key Term	Description
W8	Form W-8 must be received by our company if you are a nonresident alien who is the beneficial owner of an amount subject to withholding, or if you are an account holder of an FFI documenting yourself as a nonresident alien. If you are the single owner of a disregarded entity, you are considered the beneficial owner of income received by the disregarded entity. Submit Form W-8BEN when requested by the withholding agent, payer, or FFI whether you are claiming a reduced rate of, or exemption from, withholding. We also accept W-8BENE, W-8ECI, W-8EXP and W-8IMY.
W9	Form W-9 must be received by our company to provide your correct Taxpayer Identification Number (TIN) to allow us to determine if we need to file an information return with the IRS to report payments made to you.



Ways of Working with Constellation

The key pointers to keep in mind while working with Constellation and the Oracle Supplier portal are:



Supplier Portal is utilized as a repository for all supplier info and Suppliers can make updates to their information. Some of these updates will require Constellation review.



Only Organization Details, Addresses, Payment Methods, Bank Account details and Tax identifiers are sent for approval within Constellation.



Contacts, Business Classification and Products and Services need not be sent for approval.



Suppliers and Constellation points of contact will need to manage supplier onboarding process and supplier profile updates.





Main Menu



Click each module number to navigate through the course.

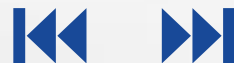
Module Name		Duration
Module 1	Supplier Portal Overview	05 minutes
Module 2	Updating Supplier Portal	10 minutes



Module:



Supplier Portal Overview



Module Objectives

After completing this module, you will be able to:

- Describe the Supplier Portal
- Navigate through the Supplier Portal



Overview Of Supplier Portal

The Oracle Supplier Portal landing page provides quick access to task and reports relevant to you. The content that you can access in the Supplier Portal is controlled by your provision credentials.

Some of the features of the Supplier Portal are:

Self Service Tool

It is a self-service tool for suppliers to perform various transactions, such as viewing POs and Invoices, submitting change requests, etc.

Infolet

The supplier portal can be used as an infolet to get a high-level view of schedules overdue or due today, invoices overdue, recent activities, etc.

Bulletin

It is also a bulletin which provides suppliers with any news related to them

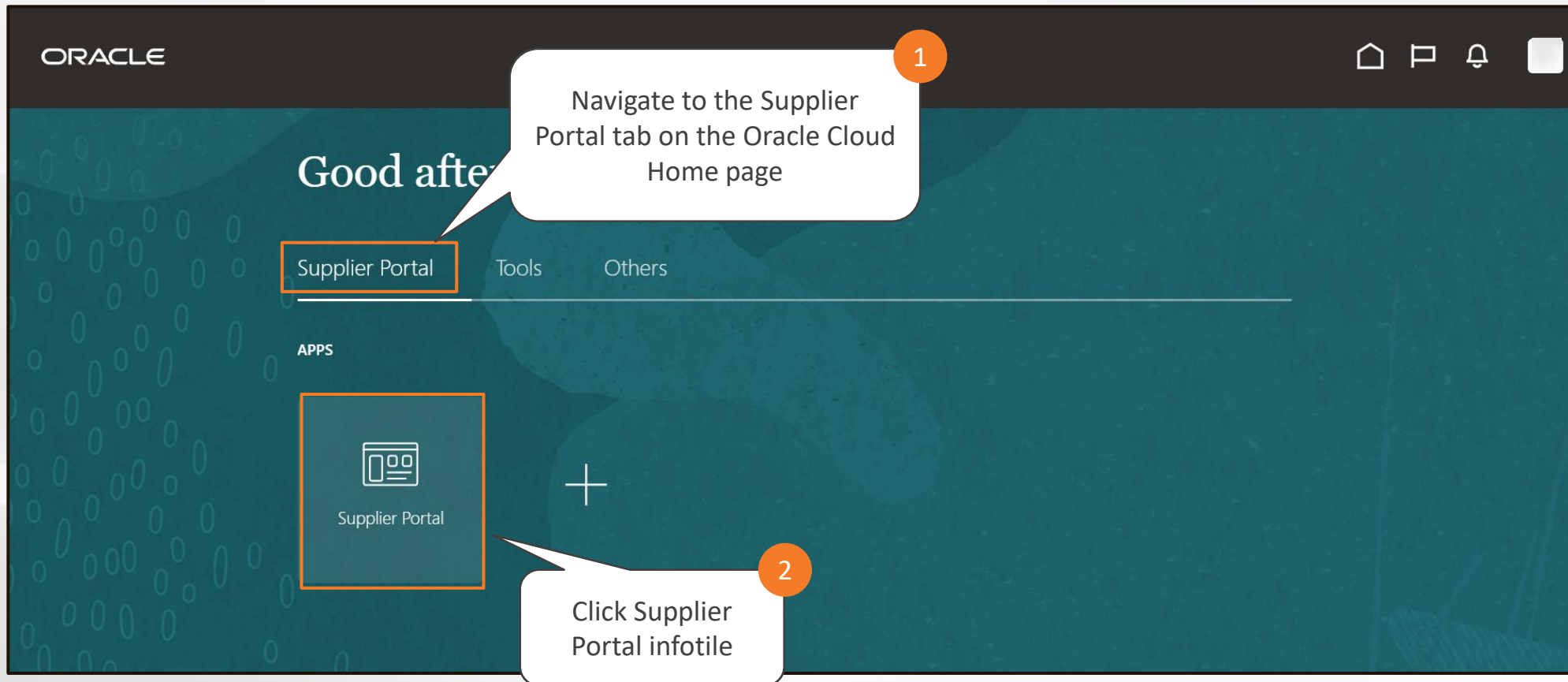
Profile Management

Suppliers can manage their profile on their own, using the supplier portal and update their details like Organization Details, Tax Identifiers, Addresses, Contacts, etc.



Supplier Portal Navigation

The Supplier Portal is a vital component that allows suppliers to interact with Constellation and update their profiles. To navigate the supplier portal, first login to Oracle Cloud.



Supplier Portal Navigation (Contd.)

The Supplier Portal page is displayed showing all the options available to the supplier to perform various transactions, manage their profile and view other information.

The screenshot shows the Oracle Supplier Portal interface. At the top left is the Oracle logo and the text 'Supplier Portal'. On the right side of the header, there are icons for home, flags, a bell (notifications), and a user profile 'JS'. A search bar is located below the header, with a dropdown menu currently open showing options: Orders, Agreements, Shipments, Invoices, Payments, Negotiations, Negotiation Responses, Questionnaires, and Manage Schedules. The 'Orders' option is selected. To the right of the dropdown is a search input field labeled 'Order Number' with a search icon. Callout 5 points to the bell icon, explaining it shows notifications for change requests, profile updates, and business classification expiry. Callout 3 points to the search dropdown and input field, stating that search criteria vary by purpose (e.g., Order Number for orders, Invoice Number for invoices). Callout 4 points to the search input field, providing the same example as callout 3.

5 The Bell icon shows notifications relating to any change requests that have been approved or rejected, profile update requests that have been approved or rejected, business classification expiry, etc.

3 On the supplier portal landing page, you can search for the required Orders, Invoices and Payments.

4 The search criteria will vary as per the purpose of your search. For example, if you are searching for a particular order, you will need to type the Order Number in the field and click the Search icon, or if you are searching for an invoice, you will need to type the Invoice Number.

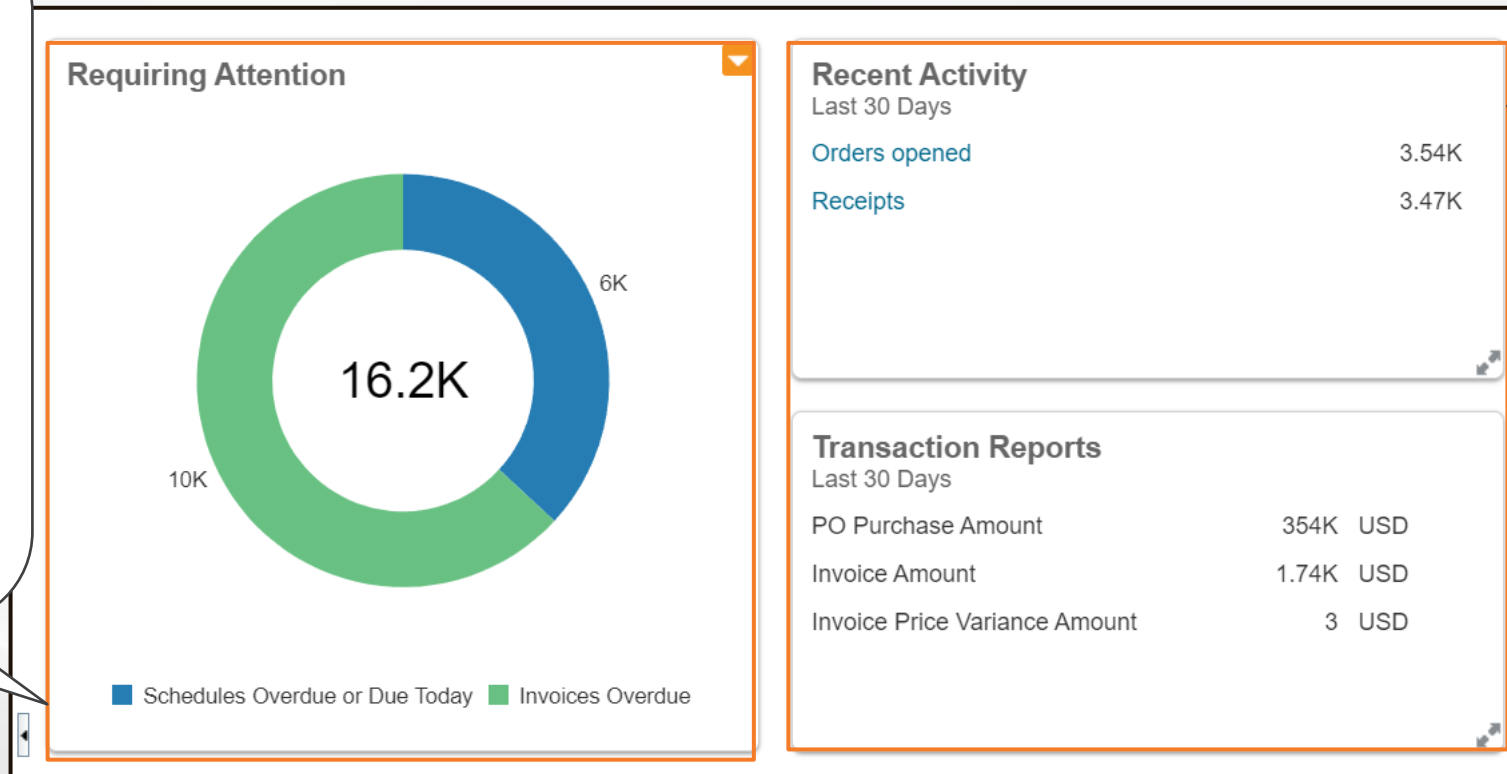
Supplier Portal Navigation (Contd.)

The Supplier Portal acts as a dynamic dashboard providing the suppliers with a high-level view of the reporting data.

6

Under the Requiring Attention tab:

1. Click the Schedules Overdue or Due Today section to directly navigate to the Manage Orders page and view a list of all the schedules that are overdue or due today.
2. Click the Invoices Overdue section to directly navigate to the View Invoices page and view a list of all the invoices that are overdue.



7

The Recent Activity and Transaction Reports tabs show the suppliers all the information related to transactions from the last 30 days.



Supplier Portal Navigation (Contd.)

Scroll down the Supplier Portal page to view the Supplier News section.

Supplier News

Please visit <https://www.constellationenergy.com/our-work/suppliers/latest-updates.html> for the link to our Supplier Code of Conduct.

Please visit <https://www.constellationenergy.com/our-work/suppliers/invoicing-and-payments.html> to access our Invoicing and Payments FAQ page

Oracle User Guides & Resources are available here (<https://www.constellationenergy.com/our-work/suppliers/current-suppliers.html>).

Please ensure your W-9 is updated every two years.

For Tax help **TBD**.

8
The supplier can check the Supplier News section to get updated on any important news or announcements relating to suppliers, resources available to them, certification updates, etc.

Supplier Portal Navigation (Contd.)

The left-hand side of the Supplier Portal page shows the Tasks list, which lists the set of activities that a supplier can access and perform.

Tasks

Orders

- [Manage Orders](#)

Shipments

- [View Receipts](#)
- [View Returns](#)

9 **Click** the Manage Orders hyperlink to search for and update the price, quantity, the promised delivery date and split the schedule of POs created against your name.

- 10
- **Click** the View Receipts hyperlink to search for and view receipts created against your name.
 - **Click** the View Returns hyperlink to search for and view returns created against your name.

Supplier Portal Navigation (Contd.)

The left-hand side of the Supplier Portal page show the Tasks list, which lists the set of activities that a supplier can access and perform.

Invoices and Payments

- [Create Invoice](#)
- [View Invoices](#)
- [View Payments](#)

11 Under the Invoices and Payments option:

- Click the [Create Invoices](#) hyperlink to create new invoices against your name
- Click the [View Invoices](#) hyperlink to search for and view the invoices that have been created against your name
- Click the [View Payments](#) hyperlink to search for and view the payments that have been issued

Qualifications

- [View Qualifications](#)

12 Under the Qualifications option click the [View Qualifications](#) hyperlink to view all the qualifications that were submitted during registration.

Company Profile

- [Manage Profile](#)

13 Access the [Manage Profile](#) page from the [Company Profile](#) option to be able to update and manage supplier profile details that were entered during onboarding, such as Organization Details, Tax Identifiers, Addresses, Contacts, etc.



Module Summary

Now that you have completed this module, you have learned to:

- Describe the Supplier Portal
- Navigate through the Supplier Portal



Module:



Updating Supplier Profile



Module Objectives

After completing this module, you will be able to:

- Update profiles in the Supplier Portal
- List the steps to request for approval of profile updates
- Upload documents in the Supplier Portal



Supplier Profile Fields

The Supplier Portal will represent a central source of supplier data for Constellation and can be leveraged by the suppliers to manually manage any profile updates.

Below is an overview of how various change requests are approved:


- 01 Organization Details, Addresses, Payment Methods, Bank Account details and Tax identifiers need to be sent for approval
- 02 Contacts, Business Classification and Products and Services need not be sent for approval
- 03 A change request notification is sent to the appropriate approvers from Constellation. They will approve or reject the request after reviewing the changes and the submitted support documents (if any).

Updating Profiles in Supplier Portal

A supplier can access and update their individual profile on Oracle Cloud. The details on the page are populated during registration which can be updated by the suppliers throughout their lifecycle. To update your profile, navigate to the Company Profile page.

The screenshot shows the Oracle Cloud 'Company Profile' page. The navigation tabs are: Organization Details, Tax Identifiers, Addresses, Contacts, Payments, Business Classifications, and Products and Services. Each tab is highlighted with a callout box explaining its content:

- 1** The Organization Details tab displays the supplier's organizational details such as Company name, Supplier Number, Supplier Type, etc.
- 2** The Tax Identifiers tab displays the supplier's tax details such as Taxpayer Country, Taxpayer ID, etc.
- 3** The Addresses tab displays the supplier's address details that have been noted and entered during registration.
- 4** The Contacts tab displays all those who have been noted as the supplier's contacts
- 5** The Payments tab displays the supplier's Bank Account details that have been submitted and the selected Payment Methods.
- 6** The Business Classifications tab displays the supplier's business Classification, such as Women owned, and Minority owned Business Enterprise certificates and the Expiration Date of the classification, etc.
- 7** The Products and Services tab displays the supplier's product Category Name(s).

 **Note:** Banking is masked from view for most Constellation users. A small set of Supply Category Manager Supplier Maintenance and AP Supplier Maintenance Employees users will be able to see the last 4 digits of your bank account number.

Updating Profiles in Supplier Portal (Contd.)

Any updates to supplier fields, be it organization related details, tax related or any certification uploads, etc. need to be done by navigating to the seven tabs from the Company Profile page.

ORACLE

Company Profile ?

Organization Details Tax Identifiers Addresses Contacts Payments Business Classifications Products and Services

General

Company AIR MONITOR CORP

Supplier Number 900008249

Supplier Type Supply

Identification

D-U-N-S Number

Customer Number

SIC

Tax Organization Type Corporation

Status Active

Upload/View Documents


Edit Done

9

Click the Edit button to make any updates to any of the supplier fields within any of the seven tabs.

8

Click the Upload/View Documents hyperlink to upload any support documents, certifications, etc. or to view existing documents submitted at the time of registration.

 **Note:** For the detailed steps to update the supplier profile refer to the Updating Supplier Profiles job aid.

Request for Approval for Profile Updates

Once all the required changes have been made, review the changes on the Review Changes page and click the Submit button to submit the change request for approval. Based on the approval criteria, these will be sent for approval to the appropriate individuals.

The screenshot shows the Oracle 'Review Changes' interface. At the top right, there are buttons for 'Edit', 'Submit', and 'Cancel'. The 'Submit' button is highlighted with a red box and a callout bubble containing the number '10' and the text 'Click the Submit button.' Below this, there is a 'Change Description' section with the text: 'Tax Organization Type is updated. Taxpayer Country is updated. Address Line 1 is updated. Salutation and Mobile number is updated.' The main content area is divided into three sections: 'Contacts', 'Business Classifications', and 'Products and Services'. Each section has a table of data.

Name	Job Title	Email	Phone	Administrative Contact	User Account	Status	Details
Minkel, Sonia		sominkel@airmonitorcorp.com	+1 (707) 521-17...	✓	✓	Active	

Classification	Subclassification	Status	Certifying Agency	Other Certifying Agency	Certificate	Start Date	Expiration Date	Notes	Provided By
FEMALE VETERAN OW...		Current	City of Baltimore (MWBOO)		SDKL579283	8/23/23	8/24/25		Sonia Minkel

Category Name	Description
73	MOTORS



Uploading Documents in Supplier Portal

Suppliers may be required to upload and update various documents in the Supplier Portal like:

Documents, such as W8/W9, Certificate of Insurance, and Banking.

Certification related to Business Classifications such as Women owned, and Minority owned Business Enterprise (WMBE) certificates

These can be uploaded via the Upload/View Documents (Documentum) link within the Organization Details tab on the Company Profile page.

Organization Details | Tax Identifiers | Addresses | Contacts | Payments | Business Classifications | Products and Services

General

Company	WW GRAINGER INC	Tax Organization Type	Corporation
Supplier Number	900003738	Status	Active
Supplier Type	Supply	Upload/View Documents	

Click the Upload/View Documents hyperlink.



Note: For the detailed steps to update the supplier profile refer to the Uploading Documents In Supplier Portal job aid.

Module Summary

Now that you have completed this module, you have learned to:

- Update profiles in the Supplier Portal
- List the steps to request for approval of profile updates
- Upload documents in the Supplier Portal



Key Takeaways

Now that you have completed the Supplier Portal – Master Data (for Suppliers) course, here are some key takeaways:

01

The Oracle Supplier Portal landing page provides quick access to task and reports relevant to you.

02

Organization Details, Addresses, Payment Methods, Bank Account details and Tax identifiers go for approval.

03

Contacts, Business classification and Products and Services do not require approval

04

A supplier can access and update their individual profile details on the Company Profile page as and when required.

05

Suppliers may be required to upload and update documents, such as W8/W9, Certificate of insurance, Women owned, Minority owned Business Enterprise (WMBE) certificates and Banking information.



Supplemental Training Resources

Here are the supplemental training materials related to the Supplier Portal – Master Data (For Suppliers) course.

Sl. No.	Job Aid
1	Updating Your Company Profile
2	Uploading Documents In Supplier Portal





THANK YOU



Congratulations! You have completed the Supplier Portal – Master Data (for Suppliers) course!