

Updating your Company Profile

Job Aid

Purpose

This document outlines the steps for updating and managing your profile in Constellation’s Supplier Portal. Managing your own data streamlines the process of managing and maintaining accurate and up-to-date supplier information, which is crucial for various business processes such as procurement, payments, and compliance.

Terms and Definitions

SL. No.	Term	Definition
1.	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.
2.	Alternate Name	Vendor “AKA” or “Also Known As” different from DBA.
3.	Business Classification	The Oracle term for identifying diversity classes.
4.	Business Unit (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. Power and Nuclear are examples of Business Units.
5.	Constellation Point of Contact	When registering, use this field to declare a contact inside of Constellation who you have a relationship with.
6.	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.
7.	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.
8.	CFS	Constellation Financial System
9.	EDI	Electronic Data Interface
10.	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.

11.	FBDI	File Based Data Import. FBDI is an excel based template used to collect your cleansed supplier details.
12.	Legal Entity	<p>A legal entity is a recognized party with rights and responsibilities given by legislation.</p> <p>Examples:</p> <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
13.	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.
14.	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.
15.	Payment Methods	Payment methods we offer are ACH, check, Wire and VCC.
16.	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.
17.	Remittance Advice	Remittance advice is a document that confirms a payment to a supplier or a vendor.
18.	Remit-To Address	This is the address payments are sent to. This address may be different from a company's official address.
19.	SIC (Standard Industrial Classification) Code	Found in the Additional Information area in the General Profile (vs SIC on Organization Tab).
20.	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.

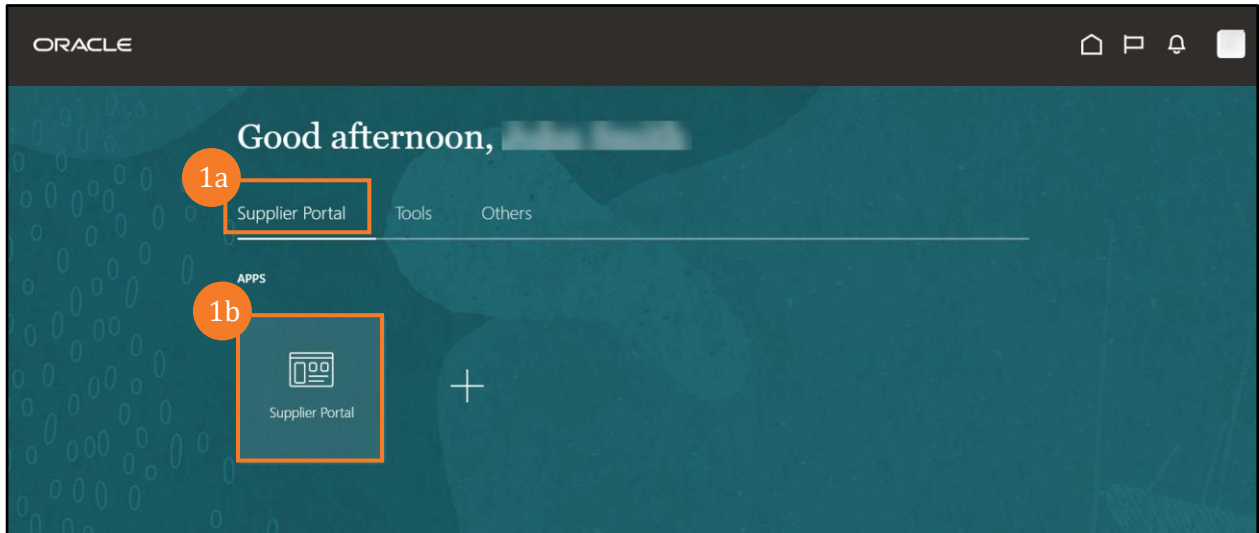
21.	Security Risk Assessment (SRA)	In cases where a procurement request is for a NERC-CIP product or service or an IT purchase that involves the exchange of Restricted Confidential or Confidential Information (per LE-AC-301), the Supplier will be asked to respond to a Security Risk Assessment.
22.	Supplier Number	Supplier Number is a system-generated nine-digit number beginning with 9 assigned to a distinct Supplier TIN and Supplier Name.
23.	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.
24.	Supplier Header/ Global Supplier Header	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.
25.	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.
26.	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.

27.	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.
28.	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.
29.	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.
30.	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.
31.	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.

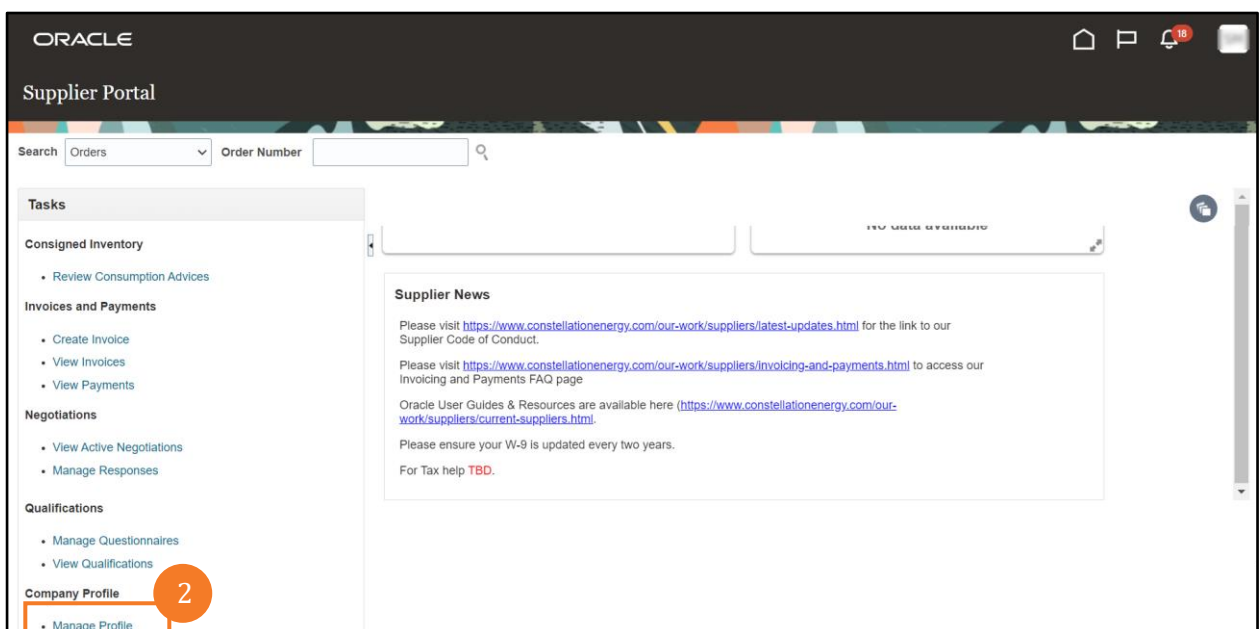
Process

Log in to Oracle Cloud by entering your credentials in the Username and Password fields. The login credentials were provided during the registration or onboarding process.

1. The Oracle Cloud Home page is displayed.
 - a. Click the Supplier Portal tab.
 - b. Click the Supplier Portal info-tile.



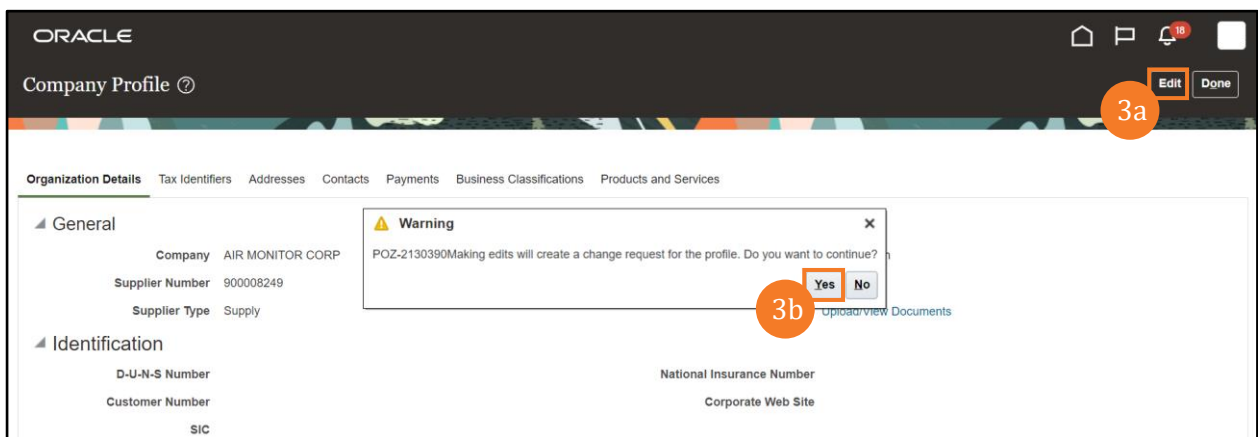
2. The Supplier Portal page is displayed. Scroll to the bottom of the page, and from the Tasks list, click the Manage Profile hyperlink under the Company Profile section.



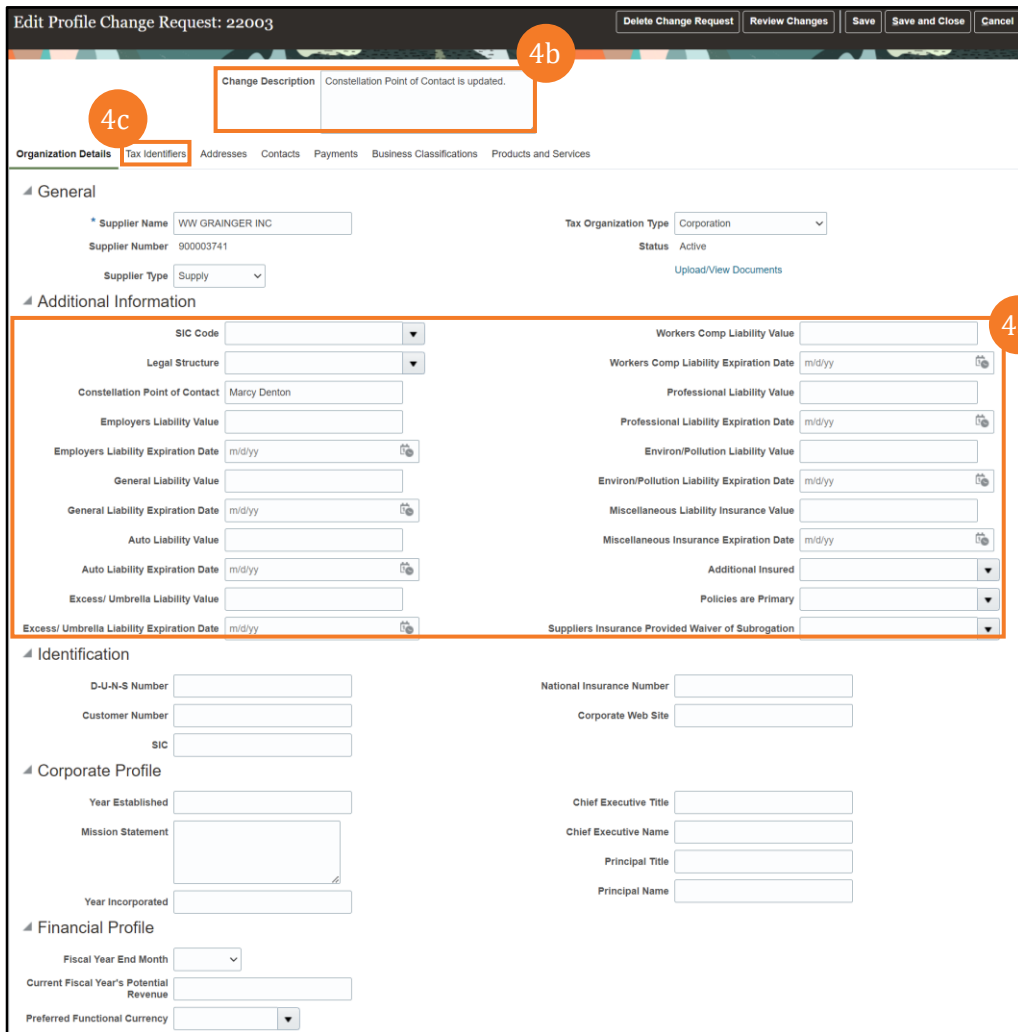
3. The Company Profile page is displayed.
 - a. Click the Edit button.
 - b. A Warning pop-window is displayed. Click the Yes button.

Note: In case a Warning pop-up window is displayed stating that there is already a pending change request associated with the profile, you can:

 - i. Click the Yes button – This will cancel the previous change request and you can go ahead with creating a new change request.
 - ii. Click the No button – Wait for the pending change request to be completed (approved or rejected) before making a new change request.
 - iii. Click the Yes button – This will cancel the previous change request. You can combine the new change request and with the previous change request by adding information for the new change request while also replicating the previous change request.



4. An editable version of the Company Profile page is displayed. Supplier Name, Supplier Type and Tax Organization Type are not permitted to be updated. Please reach out to your Constellation Supply representative for help. A list of Constellation Procurement Category Management contacts can be found here: <https://www.constellationenergy.com/our-work/suppliers/latest-updates.html>
 - a. Within the Organization Details tab, you can view and update the Additional Information section of Organization Details page. For this example, we have updated the Constellation Point of Contact.
 - b. Update the Change Description field for any updates made.
 - c. Click the Tax Identifiers tab.



Edit Profile Change Request: 22003

Buttons: Delete Change Request, Review Changes, Save, Save and Close, Cancel

Change Description: Constellation Point of Contact is updated. (4b)

Tax Identifiers Tab: (4c)

Organization Details: Addresses, Contacts, Payments, Business Classifications, Products and Services

General:

- * Supplier Name: WW GRAINGER INC
- Supplier Number: 900003741
- Supplier Type: Supply
- Tax Organization Type: Corporation
- Status: Active
- Upload/View Documents

Additional Information (4a):

- SIC Code: [Dropdown]
- Legal Structure: [Dropdown]
- Constellation Point of Contact: Marcy Denton
- Employers Liability Value: [Text]
- Employers Liability Expiration Date: m/d/yy
- General Liability Value: [Text]
- General Liability Expiration Date: m/d/yy
- Auto Liability Value: [Text]
- Auto Liability Expiration Date: m/d/yy
- Excess/ Umbrella Liability Value: [Text]
- Excess/ Umbrella Liability Expiration Date: m/d/yy
- Workers Comp Liability Value: [Text]
- Workers Comp Liability Expiration Date: m/d/yy
- Professional Liability Value: [Text]
- Professional Liability Expiration Date: m/d/yy
- Environ/Pollution Liability Value: [Text]
- Environ/Pollution Liability Expiration Date: m/d/yy
- Miscellaneous Liability Insurance Value: [Text]
- Miscellaneous Insurance Expiration Date: m/d/yy
- Additional Insured: [Dropdown]
- Policies are Primary: [Dropdown]
- Suppliers Insurance Provided Waiver of Subrogation: [Dropdown]

Identification:

- D-U-N-S Number: [Text]
- Customer Number: [Text]
- SIC: [Text]
- National Insurance Number: [Text]
- Corporate Web Site: [Text]

Corporate Profile:

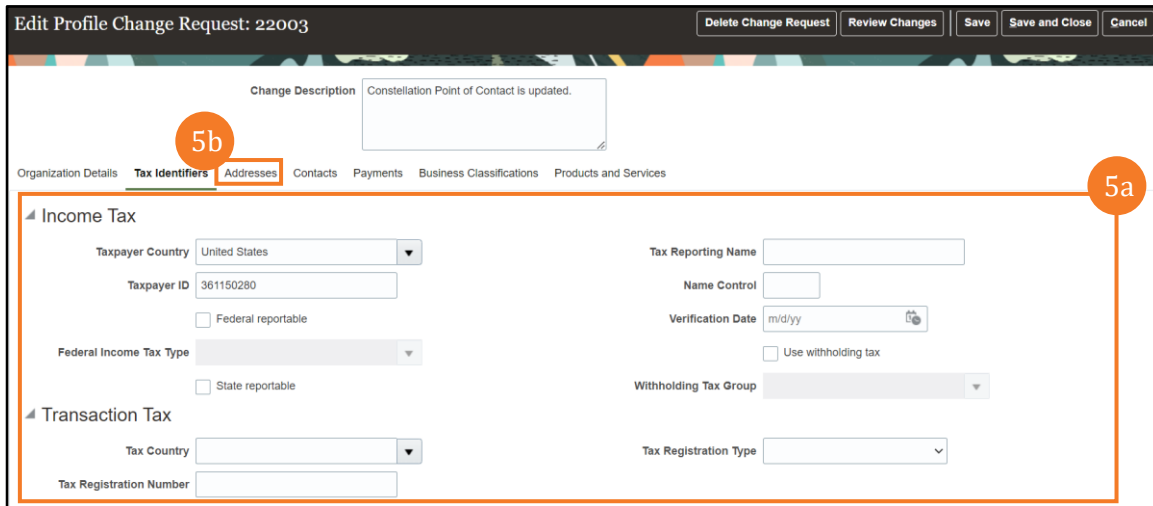
- Year Established: [Text]
- Mission Statement: [Text Area]
- Year Incorporated: [Text]
- Chief Executive Title: [Text]
- Chief Executive Name: [Text]
- Principal Title: [Text]
- Principal Name: [Text]

Financial Profile:

- Fiscal Year End Month: [Dropdown]
- Current Fiscal Year's Potential Revenue: [Text]
- Preferred Functional Currency: [Dropdown]

-
- I. SIC Code is required for Voucher-Type Suppliers. If you do not find a SIC Code applicable to your line of business, and you have selected the Supply type of Voucher or Voucher-Exempt, please be sure to return to the Supplier Type field and update the field to "Supply." Visit the Appendix for more information on Voucher use.
 - II. Legal Structure is available to Suppliers to designate themselves as 501(c)(3), 501(c)(4), other tax-exempt charity, etc.
 - III. Constellation POC field is available to enter the name of a Constellation contact, or a Constellation Category Manager which may help facilitate a quicker registration.
 - IV. Insurance Information shall be entered in the Insurance Type fields with corresponding **Coverage Value** and Expiration Date. The insurance requirements set forth in our standard terms and conditions must match the values listed in your profile. Prior to awarding a subcontract by Constellation (as well as any policy renewal that occurs), a copy of your company's Certificate of Insurance will be required and should be uploaded here. Please note additional or lesser coverage may be required as applicable, which will be dictated by the negotiated terms of the subcontract and will be handled with your associated Category Manager.
 - Employers Liability (must be \$1M minimum)
 - General Liability (must be \$1M minimum)
 - Automobile Liability (must be \$1M minimum)
 - Excess/ Umbrella Liability (must be \$4M minimum)
 - Workers Comp Liability (must not be blank)
 - Professional Liability (can be any value)
 - Environ/Pollution Liability (can be any value)
 - Miscellaneous Insurance (can be any value)
 - Additional Insured (Yes/No)
 - Policies are Primary (Yes/No)
 - Suppliers Insurance Provided Waiver of Subrogation (Yes/No)

5. On the Tax Identifiers tab, you can view tax details such as Taxpayer ID, Tax Country, Tax Registration Number, Taxpayer Country etc.
 - a. Updates to these fields are discouraged. Please contact SupplierMgmtTeam@constellation.com for assistance if you feel one of these fields needs to be updated.
 - b. Click the Addresses tab.



Change Description: Constellation Point of Contact is updated.

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

Income Tax

Taxpayer Country: United States
 Taxpayer ID: 361150280
 Federal reportable
 Federal Income Tax Type: [Dropdown]
 State reportable

Tax Reporting Name: [Text Field]
 Name Control: [Text Field]
 Verification Date: m/d/yy [Text Field]
 Use withholding tax
 Withholding Tax Group: [Dropdown]

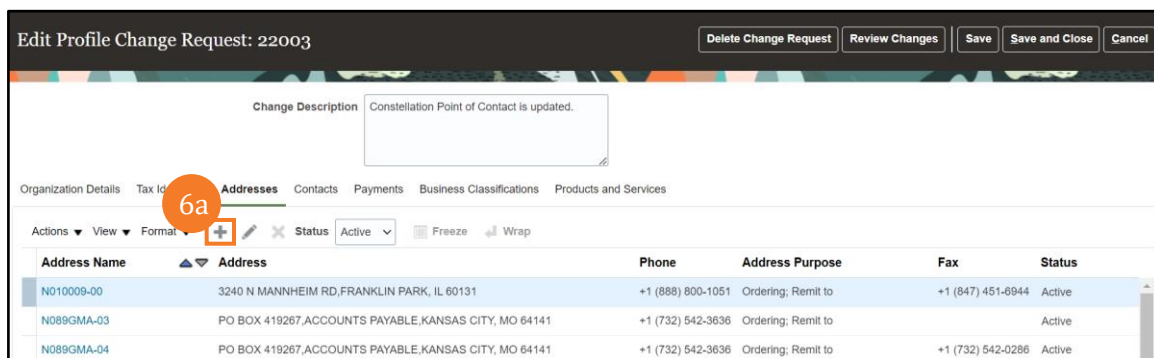
Transaction Tax

Tax Country: [Dropdown]
 Tax Registration Type: [Dropdown]
 Tax Registration Number: [Text Field]

6. **On the Addresses tab**, you can view, add, and update the address details, as required. The address details include:
 - Address purpose (Issue PO's, Issue Invoices and Receive Payments)
 - Address contacts and preferred communication methods
 - Payment and Bank Account details
 - Address Status Active or In Active

To add a contact, follow the below steps:

- a. Click the + button.



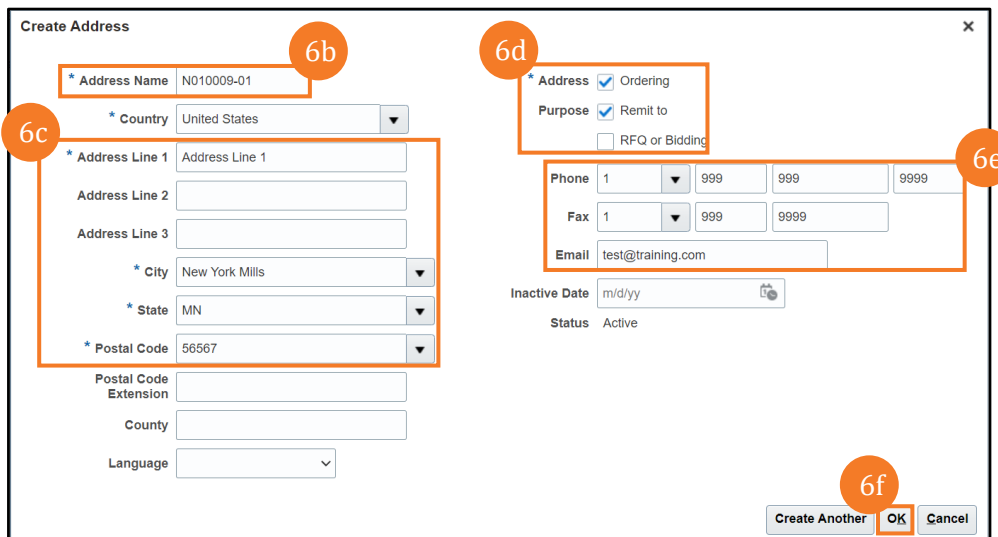
Change Description: Constellation Point of Contact is updated.

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

Actions | View | Format | **+** | Status: Active | Freeze | Wrap

Address Name	Address	Phone	Address Purpose	Fax	Status
N010009-00	3240 N MANNHEIM RD,FRANKLIN PARK, IL 60131	+1 (888) 800-1051	Ordering; Remit to	+1 (847) 451-6944	Active
N089GMA-03	PO BOX 419267,ACCOUNTS PAYABLE,KANSAS CITY, MO 64141	+1 (732) 542-3636	Ordering; Remit to		Active
N089GMA-04	PO BOX 419267,ACCOUNTS PAYABLE,KANSAS CITY, MO 64141	+1 (732) 542-3636	Ordering; Remit to	+1 (732) 542-0286	Active

- b. The Create Address pop-up window is displayed. Enter an Address Name. The Address Names you create should represent the corporate office, satellite office, PO address to, etc.
 Note: The nomenclature followed for the address name must be: 2-character codes starting from 01, 02, 03, etc.
- c. Enter your full address in the Address Line 1, Address Line 2, and Address Line 3 fields, as necessary. Also fill in other mandatory fields such as City, State and Postal Code. For this example, we have updated the Address Line 1 (mandatory field).
 Note: Constellation utilizes Smart data Service for addresses which allow us to Search and select addresses using type-ahead auto suggestion in by leveraging a curated global address repository. Consider entering the Zip first for easier movement through the fields.
- d. Select an Address Purpose. Choices are Ordering, Remit to or RFQ or Bidding.
 For this example, we have selected Ordering and Remit to.
 Note: Addresses can be set up to have one or more of these purposes as required. For instance, you may have an address where you ship materials from and a different address where you need us to send payment to.
- e. Fill in the Phone, Fax, and Email to contact this address. Failure to enter phone and email will prevent Procurement from seeing your contact information in their Procurement System. Phone number 999-999-9999 is acceptable.
- f. Click the OK button.



The screenshot shows the 'Create Address' dialog box with the following fields and callouts:

- 6b**: Points to the *** Address Name** field containing 'N010009-01'.
- 6c**: Points to the *** Address Line 1** field containing 'Address Line 1'.
- 6d**: Points to the *** Address Purpose** section where **Ordering** and **Remit to** are selected.
- 6e**: Points to the **Phone** field containing '1 999 999 9999'.
- 6f**: Points to the **OK** button at the bottom right.

Other visible fields include: * Country (United States), * City (New York Mills), * State (MN), * Postal Code (56567), Inactive Date (m/d/yy), and Status (Active).

- g. The newly added address is displayed on the page.
- h. Add a Change Description for the newly added addresses. For this example, we have added New Address has been added.

Edit Profile Change Request: 22003

Change Description: Constellation Point of Contact is updated. New address has been added.

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

Address Name	Address	Phone	Address Purpose	Fax	Status
N010009-00	3240 N MANNHEIM RD,FRANKLIN PARK, IL 60131	+1 (888) 800-1051	Ordering; Remit to	+1 (847) 451-6944	Active
N010009-01	Address Line 1,NEW YORK MILLS, MN 56567	+1 (999)999 x99...	Ordering; Remit to	+1 (999)9999	Active

7. You can Edit the address details (as required) by following the steps listed below:

a. Click the Edit icon or click the Address Name hyperlink.

Edit Profile Change Request: 22003

Change Description: Constellation Point of Contact is updated. New address has been added.

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

Address Name	Address	Phone	Address Purpose	Fax	Status
N010009-00	3240 N MANNHEIM RD,FRANKLIN PARK, IL 60131	+1 (888) 800-1051	Ordering; Remit to	+1 (847) 451-6944	Active
N010009-01	Address Line 1,NEW YORK MILLS, MN 56567	+1 (999)999 x99...	Ordering; Remit to	+1 (999)9999	Active
N089GMA-03	PO BOX 419267,ACCOUNTS PAYABLE,KANSAS CITY, MO 64141	+1 (732) 542-3636	Ordering; Remit to		Active

b. The Edit Address pop-up window is displayed. Update fields and click the OK button.

Edit Address: N010009-01

* Address Name: N010009-01

* Country: United States

* Address Line 1: Address Line 1

Address Line 2: Address Line 2

Address Line 3:

* City: New York Mills

* State: MN

* Postal Code: 56567

Postal Code Extension:

County:

Language:

* Address: Ordering

Purpose: Remit to

RFQ or Bidding

Phone: 1 999 999 9999

Fax: 1 999 9999

Email: test@training.com

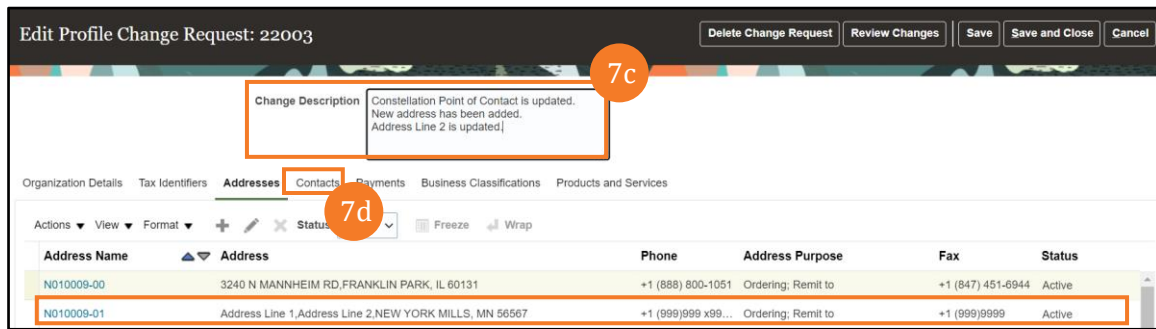
Inactive Date: m/d/yy

Status: Active

OK Cancel

c. Once the required changes have been made, enter the reason for the change in the Change Description field. For this example, we have written Address Line 2 is updated.

d. Click the Contacts tab.



8. **On the** Contacts tab, you can update your contact information, such as the primary contact person's name, email address, phone number, and physical address and add additional contacts by clicking the Add (+) icon.

The first Contact in the system will be the only person with login credentials, and cannot be deleted, until a second person is added. The first contact is responsible for adding other company contacts to the Profile. This contact will also select the type of access the added person will be granted.

Note: Constellation recommends that each company register at least two Supplier Portal users in the case that one person becomes unavailable, and a profile change needs to occur for procurement or payment to occur.

Access Types:

- Z POS EXTERNAL SUPPLIER PO INVOICE USER JR, Role has access to: - View Own Supplier Organization Profile - Request Supplier Profile Change as Supplier - View Payables Invoice as Supplier - Acknowledge Purchase Orders - Create Invoices for Supplier Company - View Payments for Supplier Company - Manage Agreements for Supplier Company - Manage Purchase Orders - Manage Order Schedules - View Profile-Review Consumption Advices
- Z POS EXTERNAL SUPPLIER INVOICING USER JR, Role has access to: - Enter Matched Payables Invoice as Supplier - View Payables Invoice as Supplier - View Supplier Payment Information as Supplier - View Supplier Profile as Supplier - View Supplier Products and Services Categories as Supplier - View Supplier Tax Information as Supplier - Review Consumption Advice
- Z POS EXTERNAL SUPPLIER ADMIN JR, Role has access to: - Access Supplier Portal - Manage Supplier Profile as Supplier - Maintain Supplier Contact as Supplier – Maintain Supplier Contacts

- a. **To edit a contact**, Click the Edit icon.

Edit Profile Change Request: 22003 Delete Change Request Review Changes Save Save and Close Cancel

Change Description: Constellation Point of Contact is updated. New address has been added. Address Line 2 is updated.

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

Actions View Format + [OK] X Status Active Freeze Detach Wrap

Name	Job Title	Email	Phone	Administrative Contact	User Account	Status
BILLING, BILLING			+1 (800) 472-4643	<input checked="" type="checkbox"/>		Active
CRUZ FLORES, MARY			+1 (956) 717-0050	<input checked="" type="checkbox"/>		Active

- b. The Edit Contact pop-up window is displayed. Make your updates to the required fields. For this example, we have updated the Salutation and the Mobile number fields.
- c. Multiple Contacts can be added and set up for different purposes after initial registration. In the Additional Information section, select a Contact Purpose from the dropdown list and also select the checkbox for Create user account.

Note: For proper integration with Constellation’s purchasing system, please select each Contact Purpose only once. The various Oracle Contact Purposes are:

- O-Executive, Executive Contact
- O-Acc Receive, Accounts Receivable
- O-Director, Director
- O-Escalation, First Escalation
- O-Manager, Manager
- O-PO Matters, Purchase Order and PO Revision Contact
- O-Quotes, Contact for Sending Requests for Quotes (RFI, RFQ, RFP)
- O-Escalate 2, Second Escalation
- O-AfterHours, Strategic contact for afterhours support
- O-Vice Pres, Vice President
- O-President, President
- O-Technical, Technical Contact
- O-Billing, Billing Contact
- O-Admin, Administration Contact
- O-Banking, Banking Contact
- O-Shipping, Shipping Contact
- O-Sales, Sales Account Manager
- O-VAQ Matter, Contact for questions regarding the Vendor Public Affiliation questionnaire
- O-Acct Pay, Accounts Payables

- d. Click the OK button.

Edit Contact: MARY CRUZ FLORES

Salutation Ms.

* First Name

Middle Name

* Last Name

Job Title

Administrative contact

Phone 1 956 7170050

Mobile 999 99999

Fax

Email

Status Active

Additional Information

* Contact Purpose O-ADMIN

Contact Addresses

Actions View Format Freeze Detach Wrap

No data to display.

Columns Hidden 5

User Account

Request user account

Roles Data Access

Actions View Format Freeze Detach Wrap

Role	Description

OK **Cancel**

e. To add a contact, click the + button.

Edit Profile Change Request: 22003

Change Description: Constellation Point of Contact is updated. New address has been added. Address Line 2 is updated. Salutation and Mobile number is updated.

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

Actions View Form + ✕ Status Active Freeze Detach Wrap

Name	Job Title	Email	Phone	Administrative Contact	User Account	Status
BILLING, BILLING			+1 (800) 472-4643	✓		Active
CRUZ FLORES, MARY			+1 (956) 717-0050	✓		Active
FINANCE, FINANCE			+1 (888) 800-1051	✓		Active

- f. The Create Contact pop-up window is displayed. Update the First Name, Last Name, Phone, and Email fields.
- g. In the Additional Information section, select a Contact Purpose from the dropdown list.

Note: For proper integration with Constellation's purchasing system, please select each Contact Purpose only once. The various Oracle Contact Purposes are:

- O-Executive, Executive Contact
 - O-Acc Receive, Accounts Receivable
 - O-Director, Director
 - O-Escalation, First Escalation
 - O-Manager, Manager
 - O-PO Matters, Purchase Order and PO Revision Contact
 - O-Quotes, Contact for Sending Requests for Quotes (RFI, RFQ, RFP)
 - O-Escalate 2, Second Escalation
 - O-AfterHours, Strategic contact for afterhours support
 - O-Vice Pres, Vice President
 - O-President, President
 - O-Technical, Technical Contact
 - O-Billing, Billing Contact
 - O-Admin, Administration Contact
 - O-Banking, Banking Contact
 - O-Shipping, Shipping Contact
 - O-Sales, Sales Account Manager
 - O-VAQ Matter, Contact for questions regarding the Vendor Public Affiliation questionnaire
 - O-Acct Pay, Accounts Payables
- h. Select the checkbox for Request user account.
- i. Click the Shell Role row.
- j. Click the x button to delete the shell role.
- k. Click the Actions dropdown menu.

Create Contact

Salutation Phone 8f

* First Name Mobile

Middle Name

* Last Name Fax

Job Title

Administrative contact Email Status

Additional Information

Contact Purpose 8g

Contact Addresses

Actions View Format Freeze Detach Wrap

No data to display.
Columns Hidden 5

User Account

Request user account 8h

Roles Data Access

Actions View Format Freeze Detach Wrap 8k

Role	Description
Z POS EXTERNAL SUPPLIER SHELL JR	

8i

- l. Select the Remove option.
- m. Select the Select and Add option.

Roles Data Access

Actions View Format Freeze Detach Wrap

Remove 8l

Select and Add 8m

Description

Z POS EXTERNAL SUPPLIER SHELL JR

- n. The Select and Add: Roles pop-up window is displayed. Select the required Roles.
- o. Click the OK button.

Select and Add: Roles ✕

▲ Search

Role Description

View ▼ Format ▼ Wrap

Role	Description
Supplier Accounts Receivable Specialist	Manages invoices and payments for the supplier company. Pri...
Supplier Bidder	Sales representative from a potential supplier responsible for r...
Supplier Customer Service Representative	Manages inbound purchase orders and communicates shipme...
Supplier Inventory Manager	Individual in a supplier organization responsible for managing i...
Supplier Sales Representative	Manages agreements and deliverables for the supplier compa...
Supplier Self Service Administrator	Manages the profile information for the supplier company. Prim...
Z POS EXTERNAL SUPPLIER ADMIN JR	Role has access to: - Access Supplier Portal - Manage Supplie...
Z POS EXTERNAL SUPPLIER INVOICING ...	Role has access to: - Enter Matched Payables Invoice as Supp...
Z POS EXTERNAL SUPPLIER PO INVOICE...	Role has access to: - View Own Supplier Organization Profile - ...
Z POS EXTERNAL SUPPLIER SHELL JR	

Rows Selected 3

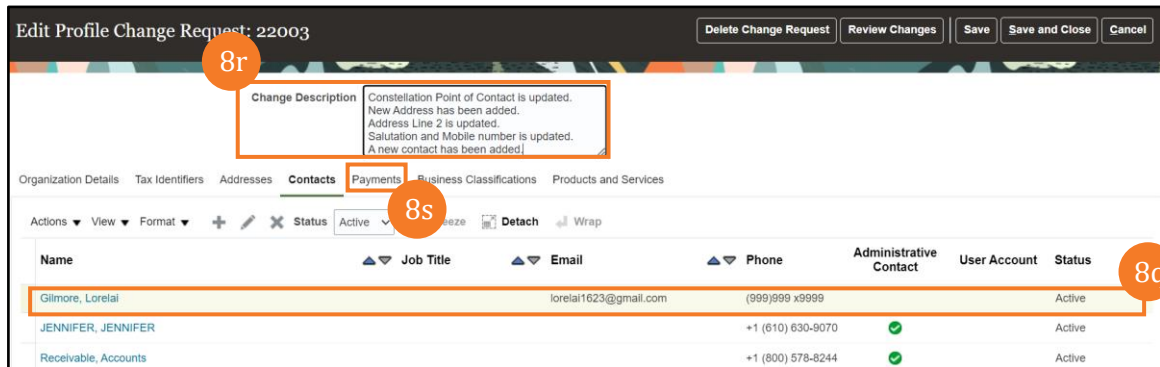
- p. Click the OK button on the Create Contact pop-up window.

Roles Data Access

Actions View ▼ Format ▼ Freeze Detach Wrap

Role	Description
Z POS EXTERNAL SUPPLIER ADMIN JR	Role has access to: - Access Supplier Portal - Manage Supplier Profile as Supplier - Maintain Supplier Contact as Supplier - Maintain Supplier ...
Z POS EXTERNAL SUPPLIER INVOICING ...	Role has access to: - Enter Matched Payables Invoice as Supplier - View Payables Invoice as Supplier - View Supplier Payment Information a...
Z POS EXTERNAL SUPPLIER PO INVOICE...	Role has access to: - View Own Supplier Organization Profile - Request Supplier Profile Change as Supplier - View Payables Invoice as Suppli...

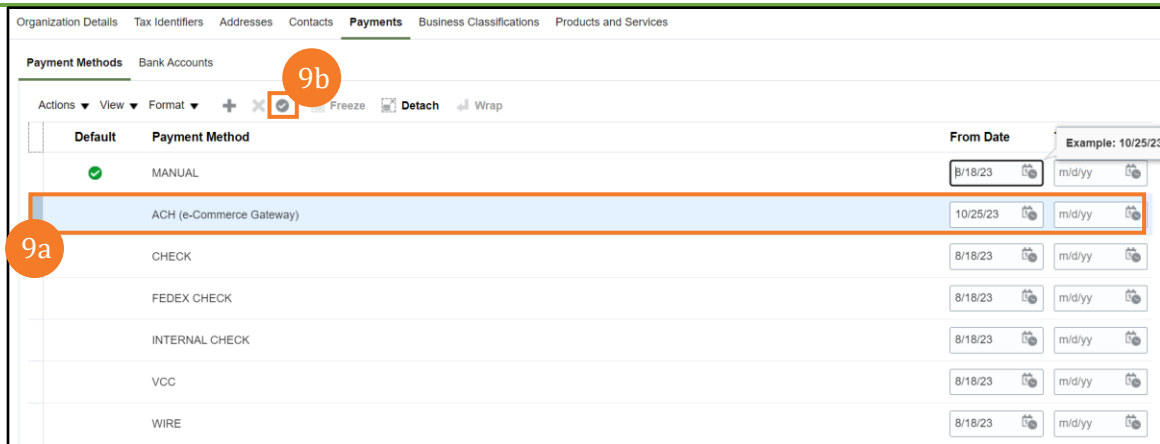
- q. The newly added contact is displayed.
- r. Once required changes have been made, enter the change reason in the Change Description field. For this example, we have written Salutation and Mobile number is updated.
- s. Click the Payments tab.



9. On the Payments tab, you can maintain your bank account information and the payment methods information. This includes providing or updating bank account numbers and other financial details required for payment processing. The individual entering the banking is responsible for ensuring any additions or edits are valid.
 - a. You can change the current Default Payment Method to a new Default. Click the required Payment Method row. For this example, we have clicked on ACH.
 - b. Click the Set Default (☑) icon.

Note:

- Some updates to banking information may require support documents to be uploaded to the Supplier Portal from the Upload/View Documents link within the Organization Details tab.
- Domestic Bank accounts are limited to 9 digits for the routing number.
- Wire bank payments are discouraged and are not permitted for foreign companies.
- Bank and bank branches are maintained by Constellation’s Cash Management Team. If your bank or bank branch is not found, please contact Cash Management at Cash.Accounting@Constellation.com along with your business contact, to have it added. The required fields are:
 - Country
 - Branch Number is used for electronic payments and may be same as routing number for US companies
 - Account number
 - Please email InvoiceInquiryTeam@constellation.com with any bank account related queries.
 - If a Payment Method of Electronic/ ACH has been selected, an associated bank account is required. Fields required are Country, Account Number and Branch Number. For United States Companies, the Routing Number should be used as the Branch Number.
- 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.



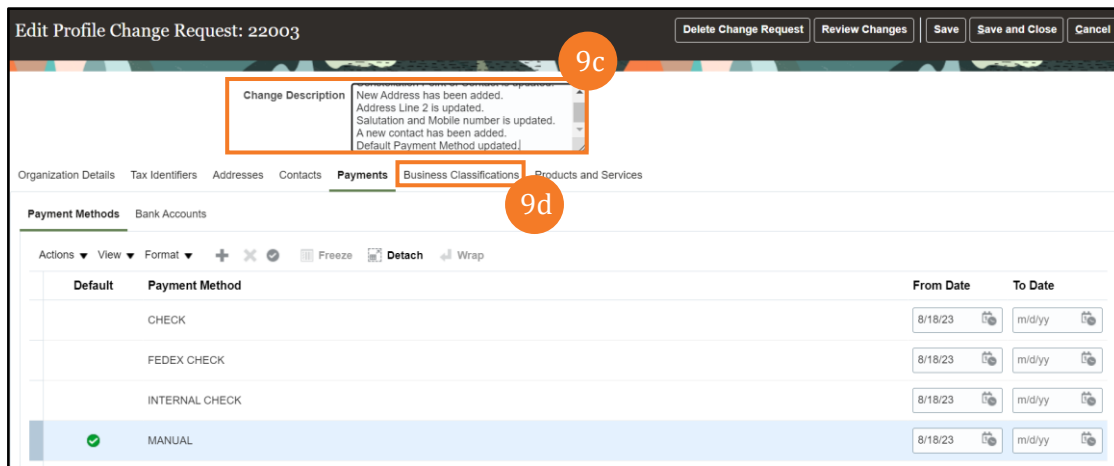
Organization Details Tax Identifiers Addresses Contacts **Payments** Business Classifications Products and Services

Payment Methods Bank Accounts

Actions View Format + X Freeze Detach Wrap

Default	Payment Method	From Date	Example: 10/25/23
<input checked="" type="checkbox"/>	MANUAL	8/18/23	m/d/yy
<input type="checkbox"/>	ACH (e-Commerce Gateway)	10/25/23	m/d/yy
<input type="checkbox"/>	CHECK	8/18/23	m/d/yy
<input type="checkbox"/>	FEDEX CHECK	8/18/23	m/d/yy
<input type="checkbox"/>	INTERNAL CHECK	8/18/23	m/d/yy
<input type="checkbox"/>	VCC	8/18/23	m/d/yy
<input type="checkbox"/>	WIRE	8/18/23	m/d/yy

- c. Once the required changes have been made, enter the change reason in the Change Description field. For this example, we have written Default Payment Method updated.
- d. Click the Business Classifications tab.



Edit Profile Change Request: 22003

Delete Change Request Review Changes Save Save and Close Cancel

Change Description

- New Address has been added.
- Address Line 2 is updated.
- Salutation and Mobile number is updated.
- A new contact has been added.
- Default Payment Method updated.

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

Payment Methods Bank Accounts

Actions View Format + X Freeze Detach Wrap

Default	Payment Method	From Date	To Date
<input type="checkbox"/>	CHECK	8/18/23	m/d/yy
<input type="checkbox"/>	FEDEX CHECK	8/18/23	m/d/yy
<input type="checkbox"/>	INTERNAL CHECK	8/18/23	m/d/yy
<input checked="" type="checkbox"/>	MANUAL	8/18/23	m/d/yy

10. The Business Classifications **tab** can display your Business Classification type, the Expiration Date of your classification, certifying agency and certificate number.

- a. From the list of Classifications listed within the tab, if none of them apply to you, select the None of the classifications are applicable checkbox.
- b. In case of any additional classifications that are available and need to be added for the supplier, click the Add (+) icon.

Note:

- Some classifications may require support documents to be uploaded to the Supplier Portal (from the Upload/View Documents link within the Organization Details tab).
- Enter your disadvantaged, minority, etc., certificates. Supplier diversity/socio-economic classifications assist Constellation in identifying business partners throughout the sourcing and acquisition process including Small Businesses teaming partners. Please select your company socio-economic classification status as certified in SAM.gov to ensure correct registration set up and Federal reporting.
- If you do not find your certifying agency in the drop down, you may select “Other” from the drop down and use the free-text “Other Certifying Agency” to type in the granting agency’s name.
- If you are a501c4 Supplier, you must attach proof of 501C4 IRS status to the classification
- Constellation’s WMBE Team will review all certifications entered in the Supplier Portal.
- You should expect to receive expiration notices from Oracle for certificates about to expire if a valid Administrative Contact has been set up.
- There are various Diversity Classifications available in Oracle such as:
 - A1 ASIAN MALE OWNED BUSINESS
 - A2 ASIAN FEMALE OWNED BUSINESS
 - A3 ASIAN MALE OWNED BUSINESS-CLASSIFIED
 - A4 ASIAN FEMALE OWNED BUSINESS-CLASSIFIED
 - AV AMERICAN VETERAN
 - B1 AFRICAN AMERICAN MALE OWNED BUSINESS
 - B2 AFRICAN AMERICAN FEMALE OWNED BUSINESS
 - B3 AFRICAN AMERICAN MALE OWNED BUSINESS-CLASSIFIED
 - B4 AFRICAN AMERICAN FEMALE OWNED BUSINESS-CLASSIFIED
 - D1 SOCIO ECONOMICALLY DISADVANTAGE-OWNED BUSINESS MALE (8A)
 - D2 SOCIO ECONOMICALLY DISADVANTAGE-OWNED BUSINESS FEMALE (8A)
 - H1 HISPANIC MALE OWNED BUSINESS
 - H2 HISPANIC FEMALE OWNED BUSINESS
 - H3 HISPANIC MALE OWNED BUSINESS-CLASSIFIED
 - H4 HISPANIC FEMALE OWNED BUSINESS-CLASSIFIED
 - L1 LESBIAN GAY BISEXUAL TRANSGENDER MALE
 - L2 LESBIAN GAY BISEXUAL TRANSGENDER FEMALE
 - N1 NATIVE AMERICAN MALE OWNED BUSINESS
 - N2 NATIVE AMERICAN FEMALE OWNED BUSINESS
 - N3 NATIVE AMERICAN MALE OWNED BUSINESS-CLASSIFIED
 - N4 NATIVE AMERICAN FEMALE OWNED BUSINESS-CLASSIFIED
 - OT OTHER
 - S1 MALE OWNED SMALL BUSINESS
 - S2 FEMALE OWNED SMALL BUSINESS
 - SB SMALL BUSINESS (SBA APPROVED)
 - SD SERVICE-DISABLE VETERAN OWNED BUSINESS
 - T2 SECOND TIER REPORTING
 - V1 MALE VETERAN OWNED BUSINESS
 - V2 FEMALE VETERAN OWNED BUSINESS

- V3 MALE VETERAN OWNED BUSINESS-CLASSIFIED
- V4 FEMALE VETERAN OWNED BUSINESS-CLASSIFIED
- W4 WOMEN BUSINESS – CLASSIFIED
- WB WOMAN OWNED BUSINESS
- Z1 HISTORICALLY UNDERUTILIZED BUSINESS ZONE (HUBZONE) MALE
- Z2 HISTORICALLY UNDERUTILIZED BUSINESS ZONE (HUBZONE) FEMALE
- Z3 HISTORICALLY UNDERUTILIZED BUSINESS ZONE(HUBZONE)MALE-CLASSI
- Z4 HISTORICALLY UNDERUTILIZED BUSINESS ZONE(HUBZONE)FEMALE-CLAS

10a

10b

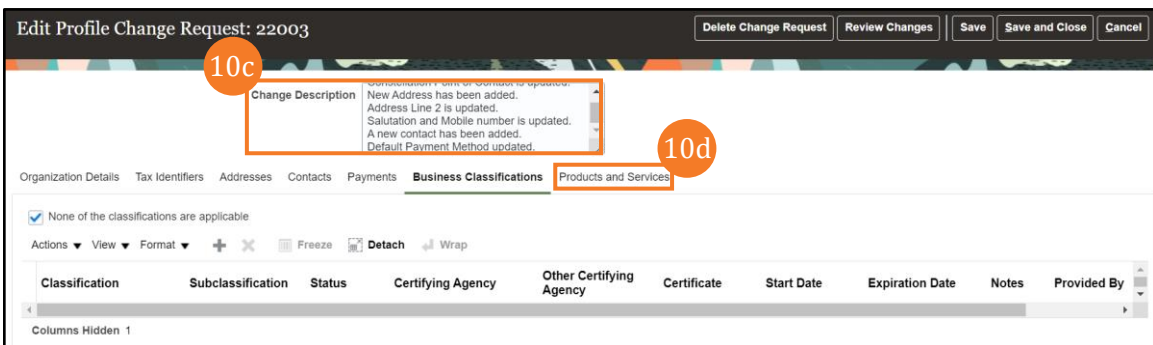
Note: If the expiration date of any existing classification needs to be updated, click the Calendar icon below the Expiration Date column, and select a new date.

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	8/23/25		Sonia Minkel

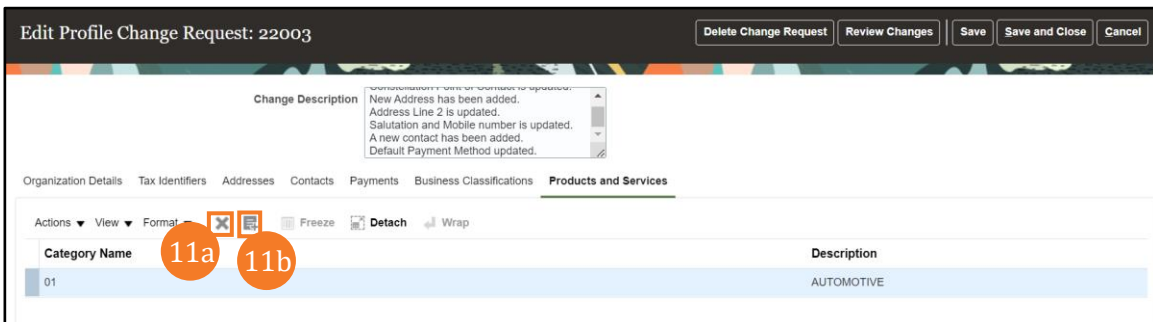
Note: An email is sent to you by Oracle when your business classification is near expiration. For example:



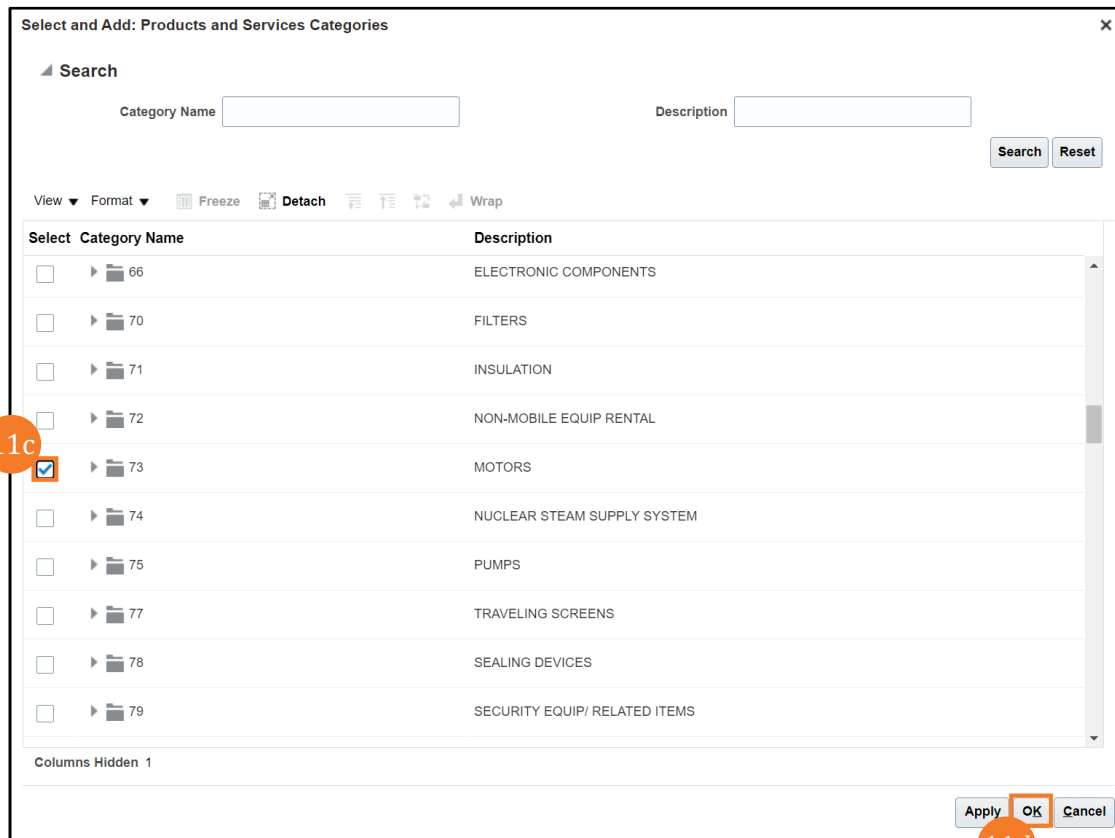
- c. Once the required changes have been made, enter the change reason in the Change Description field. For this example, we have written Expiration Date is updated.
- d. Click the Products and Services tab.



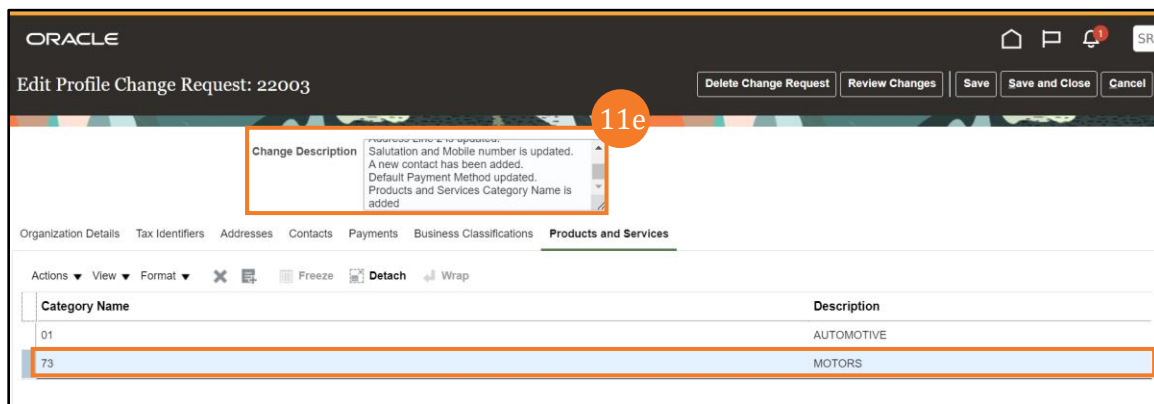
11. The Products and Service tab provides you the option of selecting one or multiple sub-categories. You can add, modify, or remove categories.
 - a. To remove existing categories, Click the Remove (x) icon.
 - b. To add additional categories, Click the Select and Add icon.



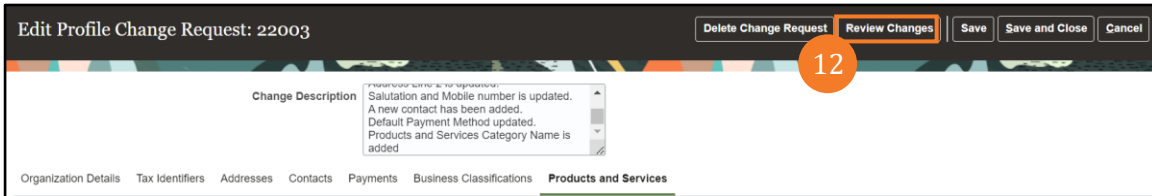
- c. Select the Category Name checkbox. For this example, we have selected Category Name: 73 and Description: MOTORS.
- d. Click the OK button.



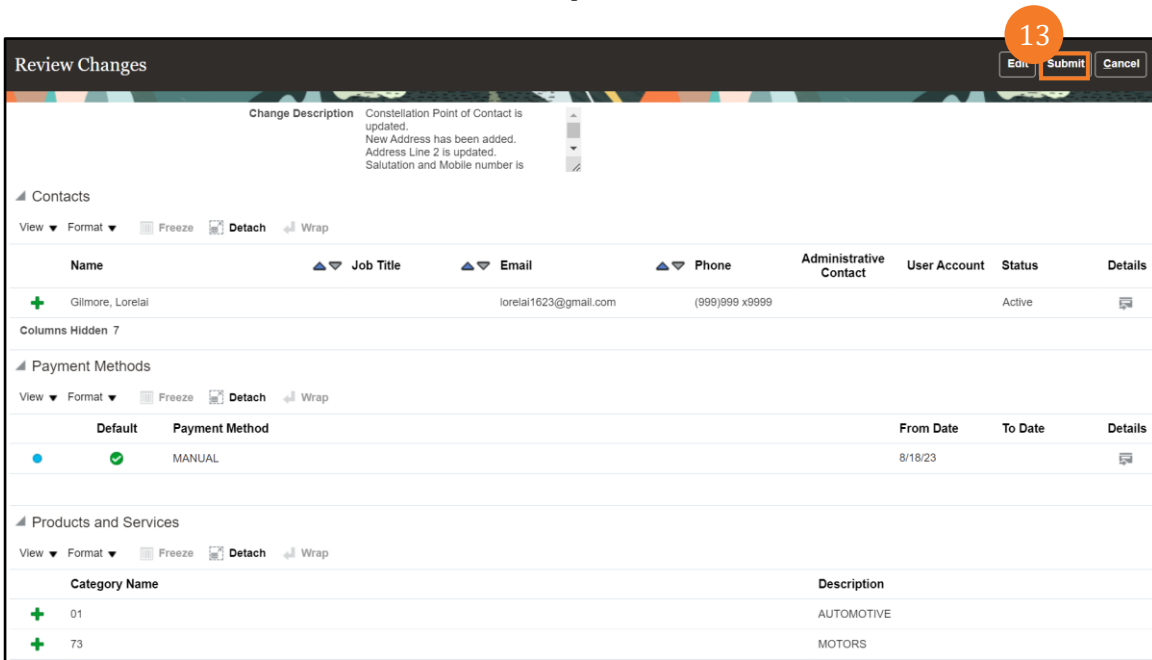
- e. The added category is now displayed on the page. Once the required changes have been made, enter the reason for updates in the Change Description field. For this example, we have written Products and Services Category Name is added.



- Once you have made all the necessary changes, click the Review Changes button.
 Note: Prior to sending for review, you have the option of using the Change Description field to reference the Constellation contact you have been working with or any other information which may help process your registration request faster. A list of Constellation Category Manager Procurement contacts can be found on the ConstellationEnergy.com\Supplier page.



- All the changes made by you are now displayed on the Review Changes page. Review, and if satisfied, click the Submit button. To make additional updates click the Edit button.



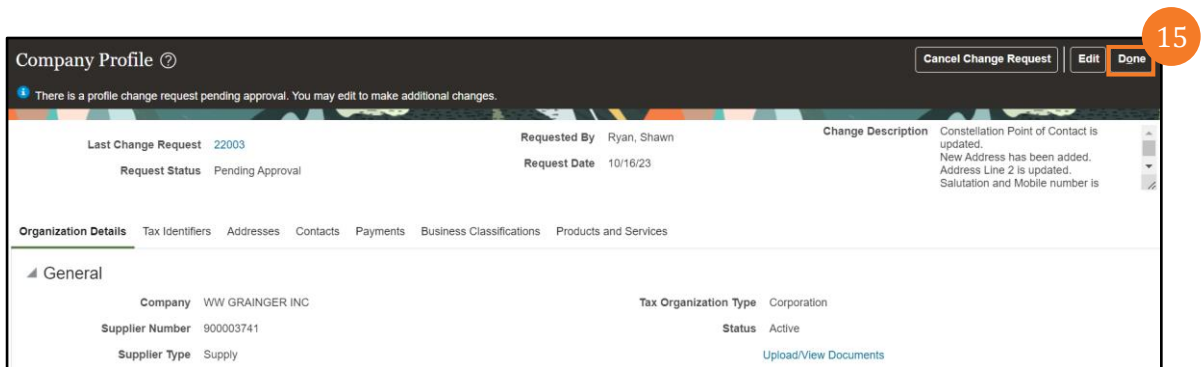
- Upon clicking submit, the Confirmation pop-up window is displayed with the confirmation message. In this example “Your profile change request 22003 was submitted for approval” is displayed. Click the OK button.



Note:

- Changes to Organization Details, Addresses, Payment Methods, Bank Account details & Tax identifiers are routed for Constellation approval.
- Changes to Contacts, Business classification and Products and Services do not require approval.

- Click the Done button.



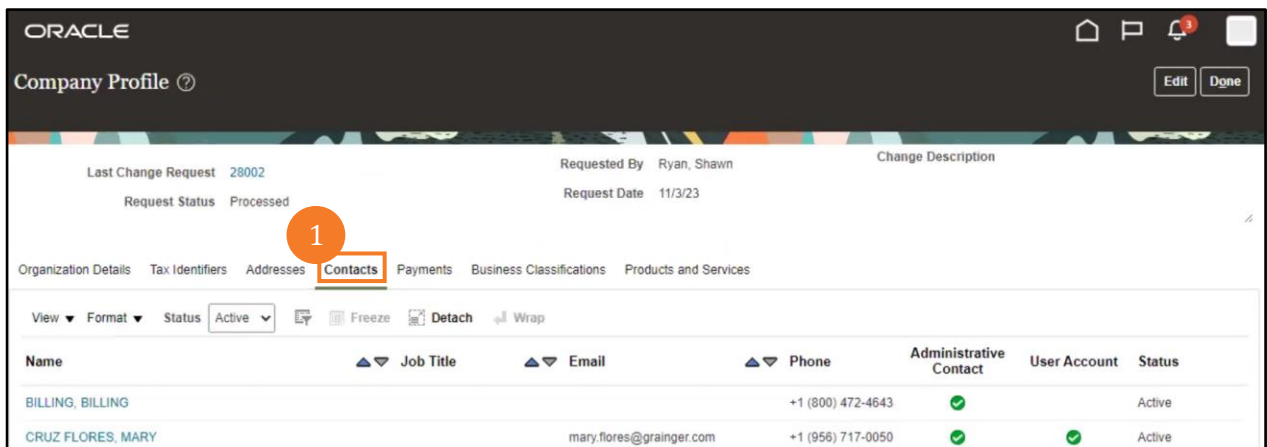
Note:

- Managing your company’s users:
 - Ensure any past employees have their access removed in the Contacts tab. This will need to be done by the ‘Administrative user’. New employees can also be added in here. This is done from the Actions button. A user cannot delete themselves from the contact list.
 - Include the following contacts: Banking, Accounts Receivable, Shipping, Bill To, Deliver To, Purchase Orders, Contacts, Sales Account Manager. Please see the onboarding instructions or scroll through the drop-down choices in the Oracle tool to see a full list of contact types.
- Deactivation of your profile: If your “Supply-Type” is Voucher or Voucher-Exempt, your profile will be inactivated after 13 months of inactivity. If your “Supply-Type” is Supply, your profile will be inactivated after 24 months of inactivity.

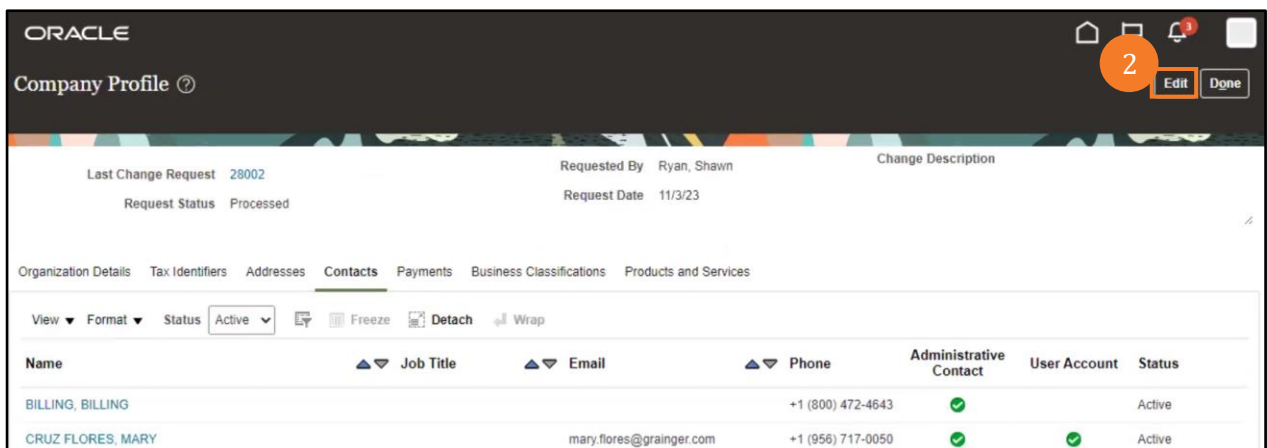
You have successfully completed the steps to manage and update your company profile.

To perform the system steps, log in to Oracle Cloud. The Oracle Cloud Home page displays. Navigate to the Company Profile page, by following steps 1 to 2 from the system steps of the Process section.

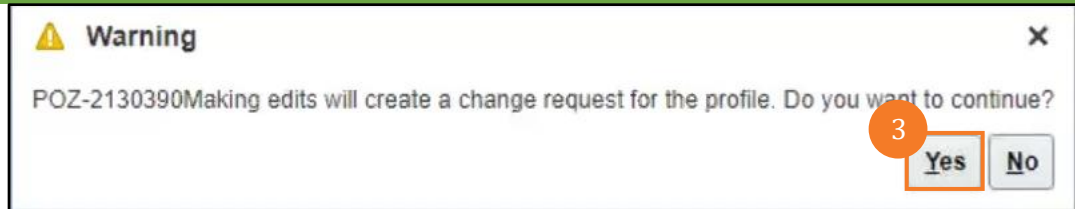
1. To inactivate a contact in the supplier portal, click the Contacts tab.



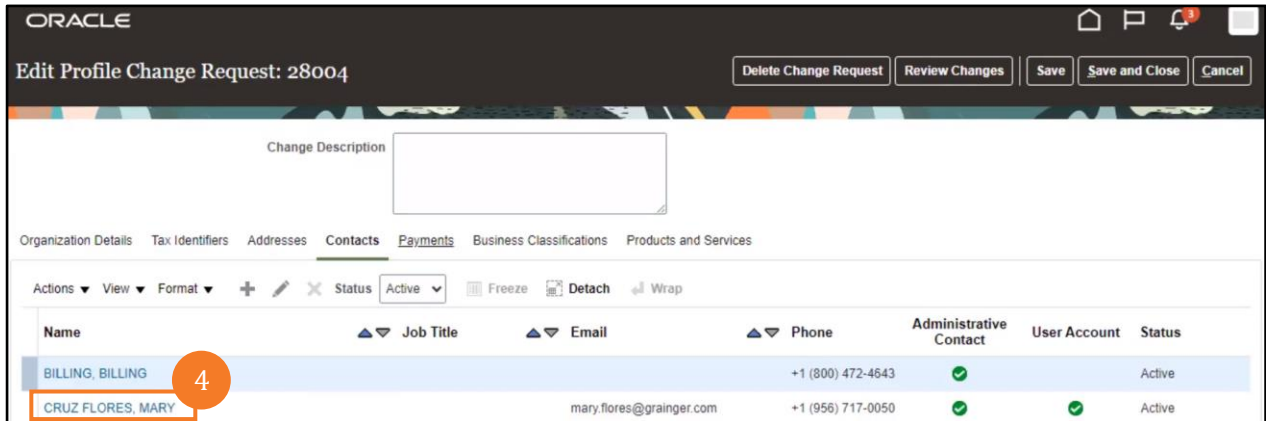
2. Click the Edit button.



3. A Warning pop-up window appears. Click the Yes button.



- The Edit Profile Change Request: 28004 page is displayed. Click the required Name hyperlink. In this example, CRUZ FLORES, MARY has been clicked.



ORACLE

Edit Profile Change Request: 28004

Change Description

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

Actions View Format + ✕ Status Active Freeze Detach Wrap

Name	Job Title	Email	Phone	Administrative Contact	User Account	Status
BILLING, BILLING			+1 (800) 472-4643	✓		Active
CRUZ FLORES, MARY		mary.flores@grainger.com	+1 (956) 717-0050	✓	✓	Active

- The Edit Contact: MARY CRUZ FLORES pop-up window is displayed. Select the required Status from the drop-down list. In this example, Inactive has been selected. You can also view the Inactive Date as 11/6/23.

Note: The Account Status under the User Account section gets auto-updated to Inactive on updating the Status.

Edit Contact: MARY CRUZ FLORES ✕

Salutation

* First Name

Middle Name

* Last Name

Job Title

Administrative contact

Phone

Mobile

Fax

Email

5 Status

Inactive Date 11/6/23

Additional Information

* Contact Purpose

Contact Addresses

Actions View Format Freeze Detach Wrap

Address Name	Address	Phone	Address Purpose	Status
No data to display.				
Columns Hidden 5				

User Account

Account Status

User Name MARY.CRUZ FLORES

- Click the OK button.

User Account

Account Status

User Name MARY.CRUZ FLORES

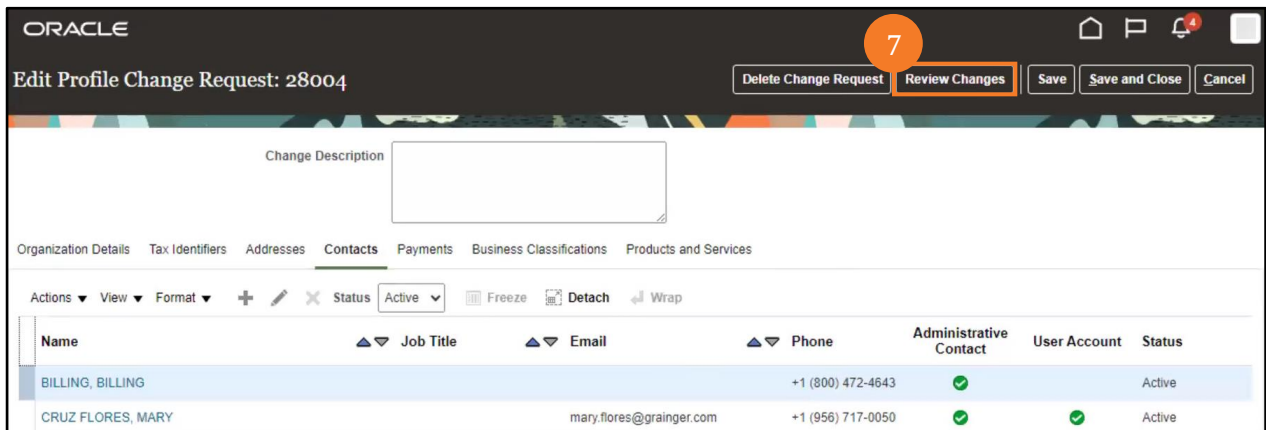
Roles Data Access

Actions View Format Freeze Detach Wrap

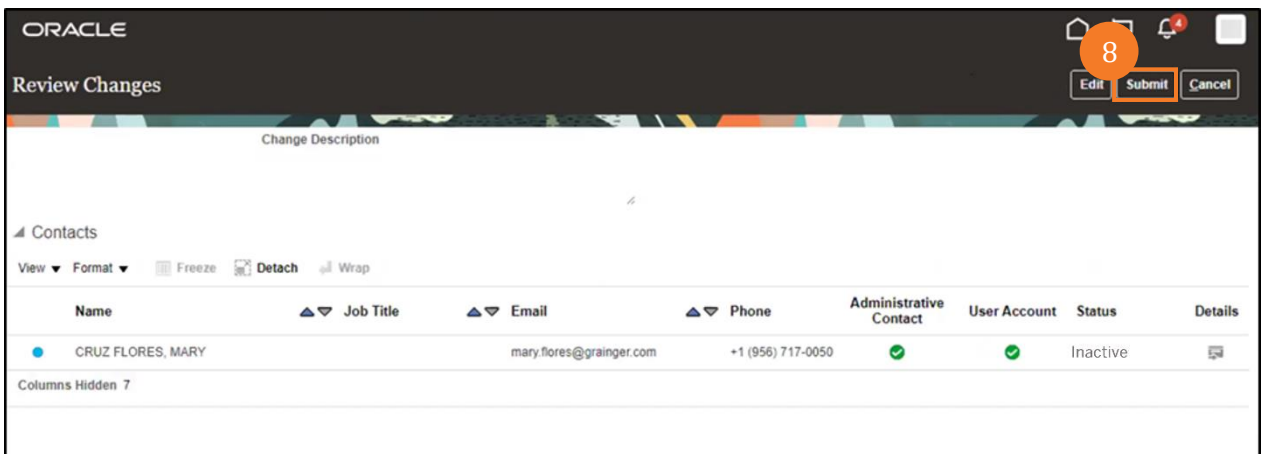
Role	Description
No data to display.	

6

- The Edit Profile Change Request: 28004 page is displayed. Click the Review Changes button to review the changes.



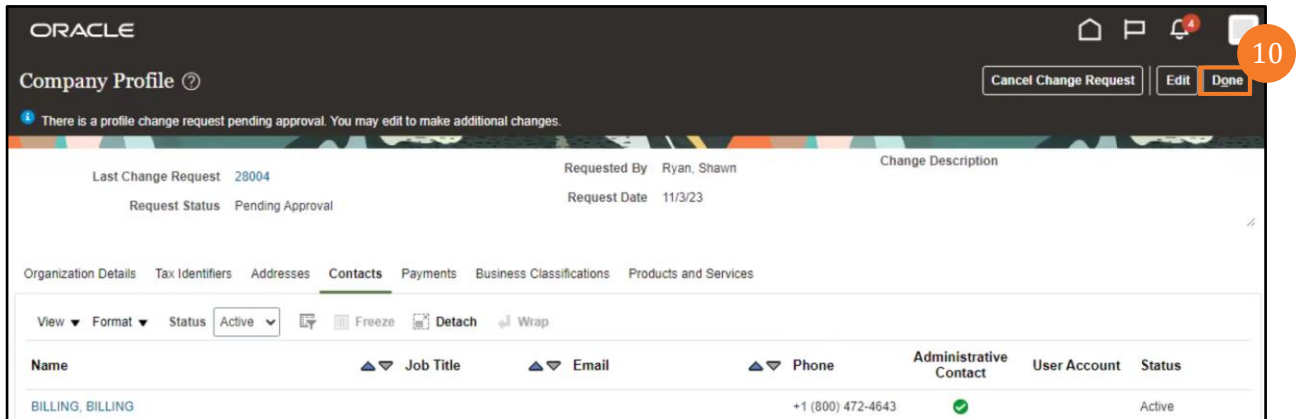
- The Review Changes page is displayed. You can view details such as Name, Job Title, Email, Phone, Administrative Contact, User Account, Status and Details. Click the Submit button.



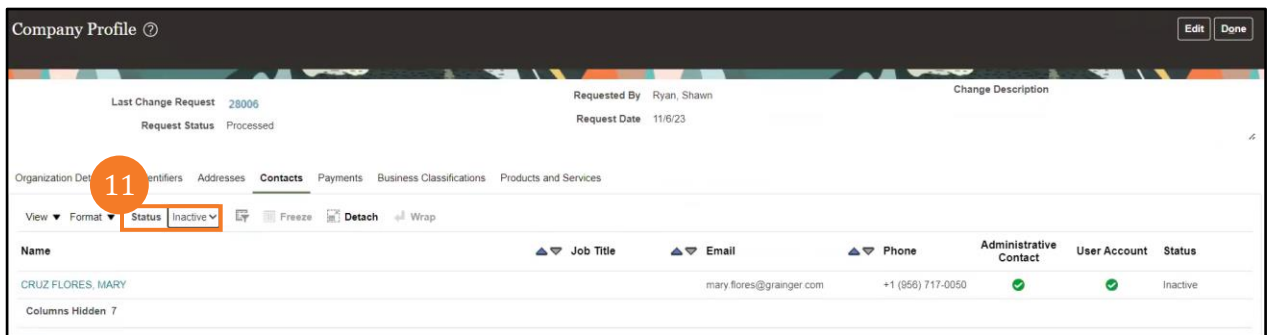
- A Confirmation pop-up window appears. Click the OK button.



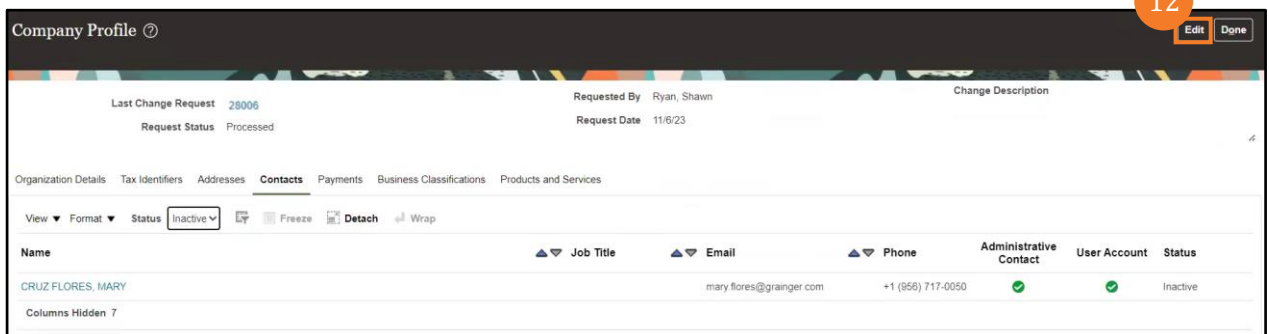
10. The Company Profile page is displayed. Click the Done button.



11. To reactivate a contact in the supplier portal, select the required Status from the drop-down list under the Contacts tab. In this example, Inactive has been selected.



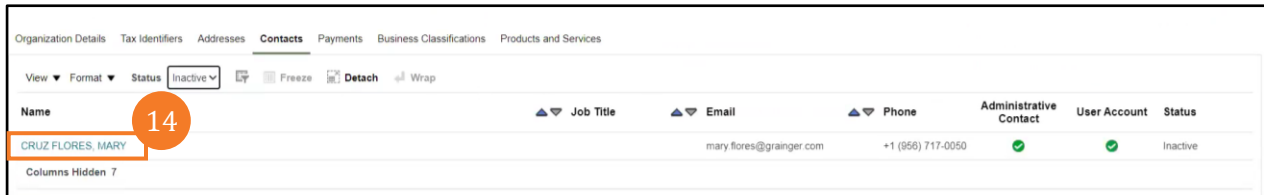
12. Click the Edit button.



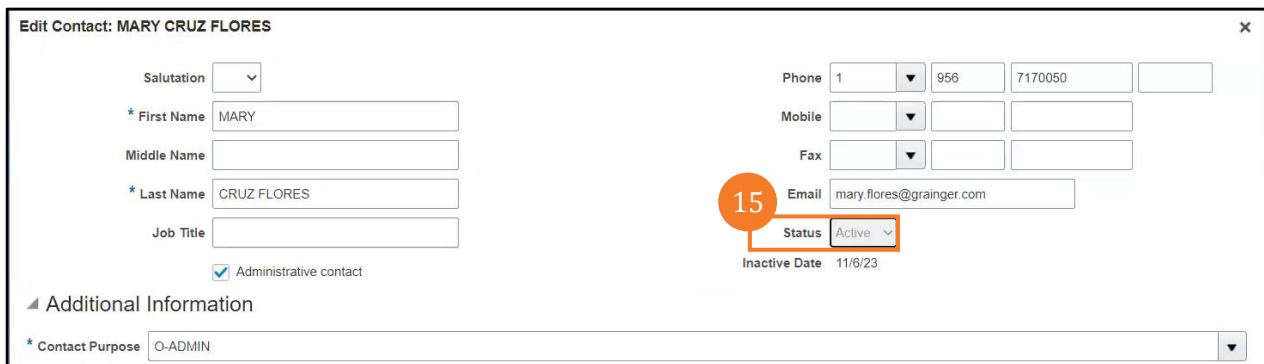
- A Warning pop-up window is displayed. Click the Yes button.



- Click the required Name hyperlink. In this example, CRUZ FLORES, MARY has been clicked.



- The Edit Contact: MARY CRUZ FLORES pop-up window is displayed. Select the required Status from the drop-down list. In this example, Active has been selected.



- A Warning pop-up window is displayed. Click the OK button.



- Select the required Account Status from the drop-down list under the User Account section. In this example, Active has been selected.

Edit Contact: MARY CRUZ FLORES ✕

Salutation

* First Name

Middle Name

* Last Name

Job Title

Administrative contact

Phone

Mobile

Fax

Email

Status

▲ Additional Information

* Contact Purpose

▲ Contact Addresses

Actions View Format Freeze Detach Wrap

Address Name	Address	Phone	Address Purpose	Status
No data to display.				
Columns Hidden 5				

▲ User Account

Account Status 17

User Name

- Click the Delete button to delete the required shell Role. In this example, the Z POS EXTERNAL SUPPLIER SHELL JR is deleted.

▲ User Account

Account Status

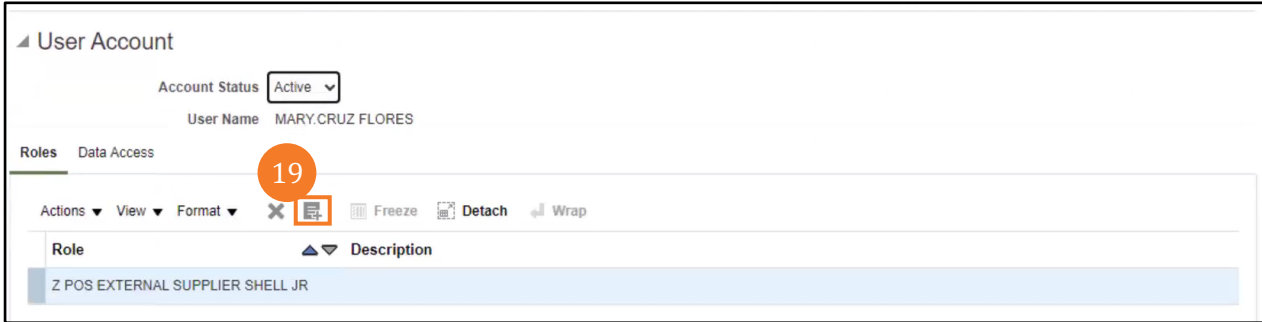
User Name

Roles Data Access

Actions View Format Freeze Detach Wrap

Role	Description
Z POS EXTERNAL SUPPLIER SHELL JR	

19. Click the Select and Add icon.



▲ User Account

Account Status Active ▼

User Name MARY.CRUZ FLORES

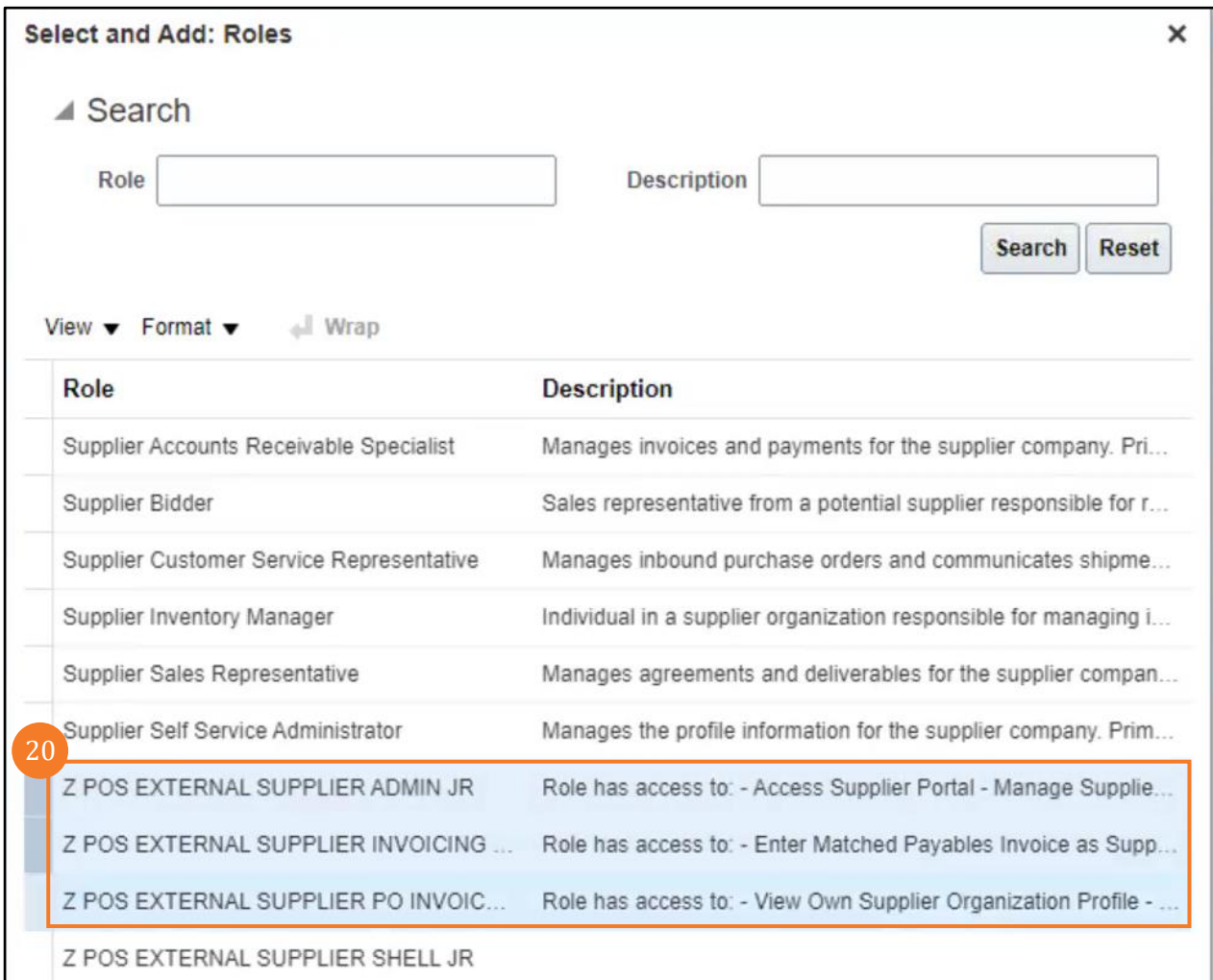
Roles Data Access

19

Actions ▼ View ▼ Format ▼ X [Select and Add] Freeze Detach Wrap

Role	Description
Z POS EXTERNAL SUPPLIER SHELL JR	

20. The Select and Add: Roles pop-up window is displayed. Select the required Role from the list to assign to the contact. In this example, Z POS EXTERNAL SUPPLIER ADMIN JR, Z POS EXTERNAL SUPPLIER INVOICING USER JR and Z POS EXTERNAL SUPPLIER PO INVOICE USER JR have been selected.



Select and Add: Roles X

▲ Search

Role Description

Search Reset

View ▼ Format ▼ Wrap

Role	Description
Supplier Accounts Receivable Specialist	Manages invoices and payments for the supplier company. Pri...
Supplier Bidder	Sales representative from a potential supplier responsible for r...
Supplier Customer Service Representative	Manages inbound purchase orders and communicates shipme...
Supplier Inventory Manager	Individual in a supplier organization responsible for managing i...
Supplier Sales Representative	Manages agreements and deliverables for the supplier compan...
Supplier Self Service Administrator	Manages the profile information for the supplier company. Prim...
Z POS EXTERNAL SUPPLIER ADMIN JR	Role has access to: - Access Supplier Portal - Manage Supplie...
Z POS EXTERNAL SUPPLIER INVOICING ...	Role has access to: - Enter Matched Payables Invoice as Supp...
Z POS EXTERNAL SUPPLIER PO INVOIC...	Role has access to: - View Own Supplier Organization Profile - ...
Z POS EXTERNAL SUPPLIER SHELL JR	

20

21. Click the OK button.

Role	Description
Supplier Accounts Receivable Specialist	Manages invoices and payments for the supplier company. Pri...
Supplier Bidder	Sales representative from a potential supplier responsible for r...
Supplier Customer Service Representative	Manages inbound purchase orders and communicates shipme...
Supplier Inventory Manager	Individual in a supplier organization responsible for managing i...
Supplier Sales Representative	Manages agreements and deliverables for the supplier compan...
Supplier Self Service Administrator	Manages the profile information for the supplier company. Prim...
Z POS EXTERNAL SUPPLIER ADMIN JR	Role has access to: - Access Supplier Portal - Manage Supplie...
Z POS EXTERNAL SUPPLIER INVOICING ...	Role has access to: - Enter Matched Payables Invoice as Supp...
Z POS EXTERNAL SUPPLIER PO INVOIC...	Role has access to: - View Own Supplier Organization Profile - ...
Z POS EXTERNAL SUPPLIER SHELL JR	

Rows Selected 3

Apply **OK** Cancel

22. The Edit Contact: MARY CRUZ FLORES pop-up window is displayed. Click the Data Access tab to view the *Supplier with data access. Any User Account created for a contact within a supplier will have access to the *Supplier. In this example, the supplier contact will have access to WW GRAINGER INC.

User Account

Account Status: Active

User Name: MARYCRUZ FLORES

Roles: **Data Access**

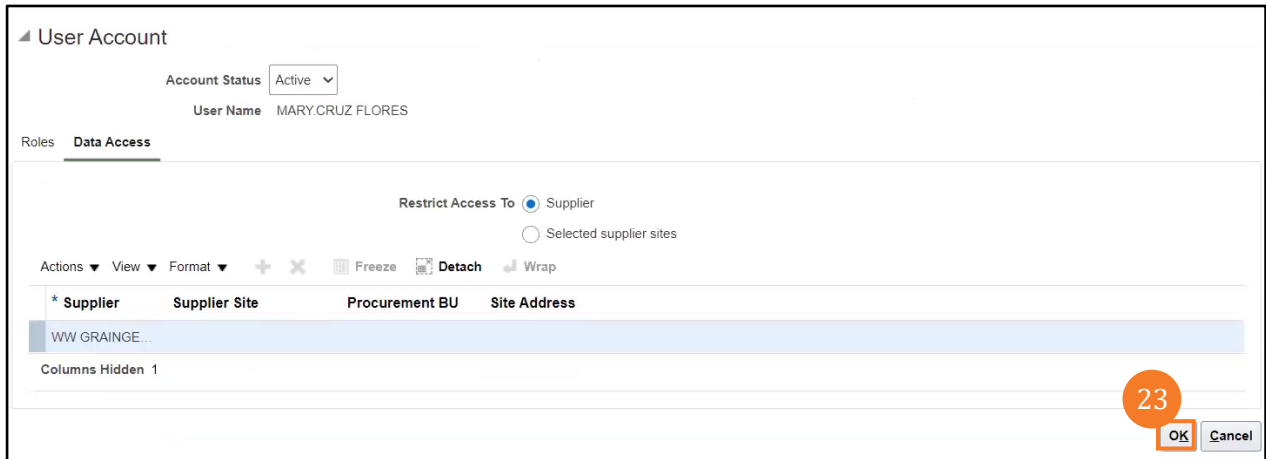
Restrict Access To: Supplier Selected supplier sites

Actions: View, Format, Freeze, Detach, Wrap

* Supplier	Supplier Site	Procurement BU	Site Address
WW GRAINGE...			

Columns Hidden 1

23. Click the OK button.



User Account

Account Status: Active

User Name: MARY.CRUIZ FLORES

Roles: **Data Access**

Restrict Access To: Supplier
 Selected supplier sites

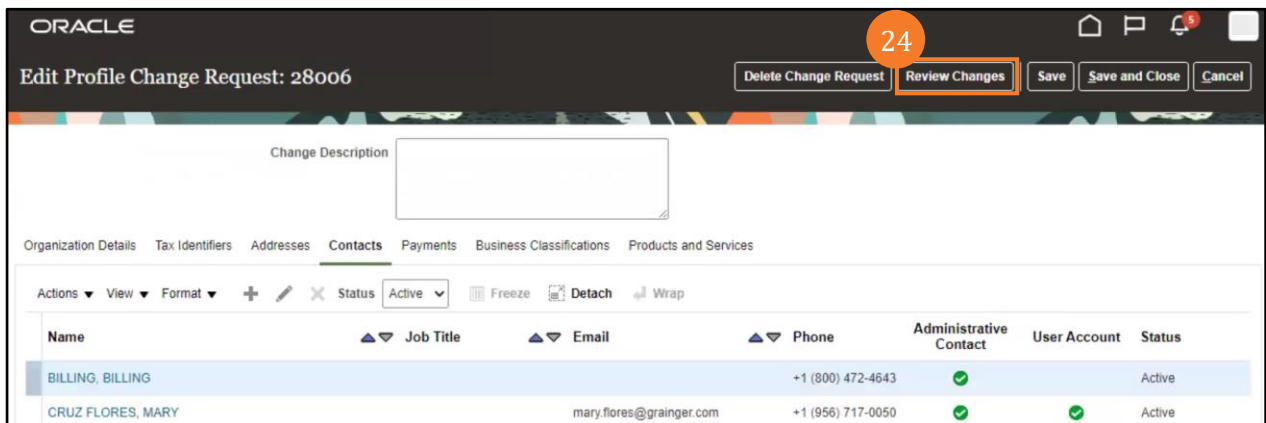
Actions: View, Format, Freeze, Detach, Wrap

* Supplier	Supplier Site	Procurement BU	Site Address
WW GRAINGE...			

Columns Hidden: 1

23 OK Cancel

24. The Edit Profile Change Request: 28006 page is displayed. Click the Review Changes button to review the changes.



ORACLE

Edit Profile Change Request: 28006

Delete Change Request **24** Review Changes Save Save and Close Cancel

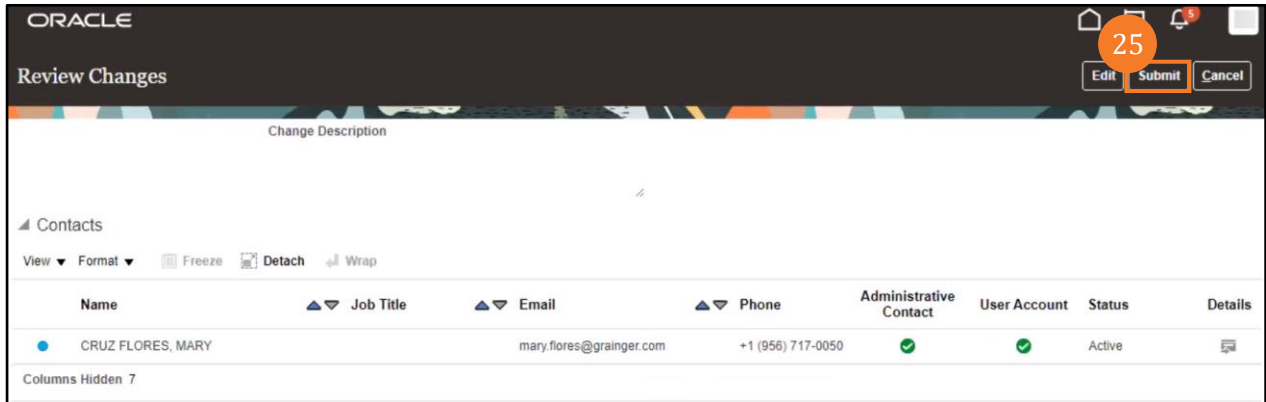
Change Description

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

Actions: View, Format, Status: Active, Freeze, Detach, Wrap

Name	Job Title	Email	Phone	Administrative Contact	User Account	Status
BILLING, BILLING			+1 (800) 472-4643	✓		Active
CRUIZ FLORES, MARY		mary.flores@grainger.com	+1 (956) 717-0050	✓	✓	Active

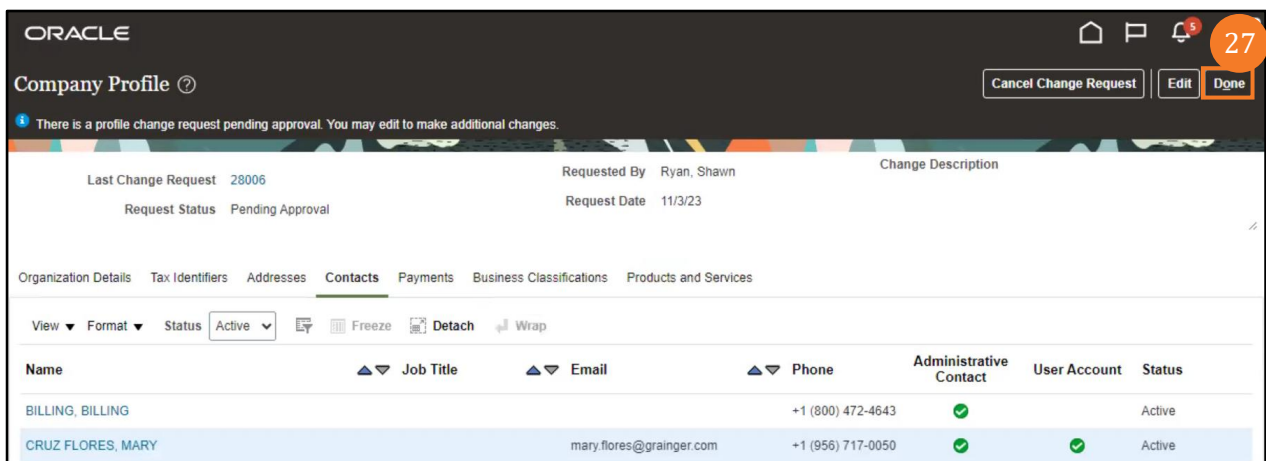
25. The Review Changes page is displayed. You can view details such as Name, Job Title, Email, Phone, Administrative Contact, User Account, Status and Details. Click the Submit button.



26. A Confirmation pop-up window appears. Click the OK button.



27. Click the Done button.



You have successfully completed the steps to inactivate and reactivate contacts in the supplier portal.