Submitting a Change Request Against a Material PO on the Supplier Portal

Job Aid

Purpose

This document will walk you through how to submit a change request against Material POs using Constellation's Supplier Portal. Below are the change requests than can be created:

- Quantity - Request changes to quantity of items by increasing or decreasing the quantity ordered on the PO.
- Price - Request changes to the unit prices associated with the PO.
- Promised Delivery Date - Request changes to the delivery date, like if there is a need to delay or expedite delivery.
- Schedule Split - Request changes to the delivery schedule like splitting the delivery of items into multiple schedules.

Note: No changes are to be made to POs with document style as Service PO and Service PO Signature.

Terms and Definitions

Sl. No:	Term	Definition
1.	Promised Delivery Date	It indicates the date by which the supplier is expected to deliver the goods or services specified in the PO.
2.	Schedule Split	It is the ability to divide a purchase order line into multiple delivery schedules. This feature is useful when the items in a purchase order need to be delivered in installments or over different dates.
3.	Order	It refers to a purchase order or procurement order placed by a buyer to request goods from a supplier. It is a formal document that outlines the specific items, quantities, prices, etc. and other details related to a procurement transaction.
4.	Creation Date	It refers to the creation date of a document or record, such as a purchase order, invoice, or any other transaction, is a key piece of information to track orders.
5.	Sold-to Legal Entity	It involves associating a purchase order or a transaction with a specific legal entity within the buying organization. This information helps in determining the legal entity responsible for the transaction, taxation, and other legal and financial matters.
6.	Bill-to BU	It involves linking the order to a particular business unit within the buying organization that is responsible for the billing and financial aspects of the transaction.
7.	Supplier Site	It refers to a specific location or address associated with a supplier within the procurement and supplier management modules.
8.	Bill-to Location	It involves linking the order to a particular physical or postal address within the buying organization where invoices and billing-related documents should be sent.
9.	Ship-to Location	It refers to the specific delivery or shipping address where goods or services are to be sent or provided by a supplier.
10.	Ordered	It refers to the action of creating a purchase order. When a buyer creates a purchase order, the items, or services they intend to purchase are listed in

|		the order. This order is then sent to the supplier through the Oracle Supplier Portal.
11.	Description	It refers to a field within procurement, which is often associated with documenting and describing changes made to the Quantity, Price, etc. in a PO.
12.	Source Agreement	It is a formal contract or agreement that is established between Constellation and its Suppliers. Source Agreements are used to outline the terms, conditions, and pricing for the procurement of goods or services, typically through a negotiated sourcing event such as a Request for Quotation (RFQ), Request for Proposal (RFP), or Auction.
13.	Supplier Order	It refers to an order placed by a supplier to request goods from a buyer. This order is initiated by the supplier.
14.	Main Line	It refers to the primary or principal line item within a purchase order or a transaction. It represents the main product or service being ordered, as opposed to any additional items or services that might be included in the same order.
15.	Line Subline	It refers to different levels of items within a purchase order or transaction. Understanding these terms is essential for managing complex purchase orders with multiple products or services.
16.	Header Subline	It is generally used to manage complex purchase orders or transactions with multiple levels of details.
17.	Type – Subline	It refers to a specific category or classification of items within a purchase order or transaction. This classification is used to organize and manage different types of products, services, or variations within a single purchase order line item.

Process

To access the Supplier Portal, login to Oracle Cloud.

1. The Oracle Cloud Home page is displayed.
   a. Click the Supplier Portal tab.
   b. Click the Supplier Portal infotile.
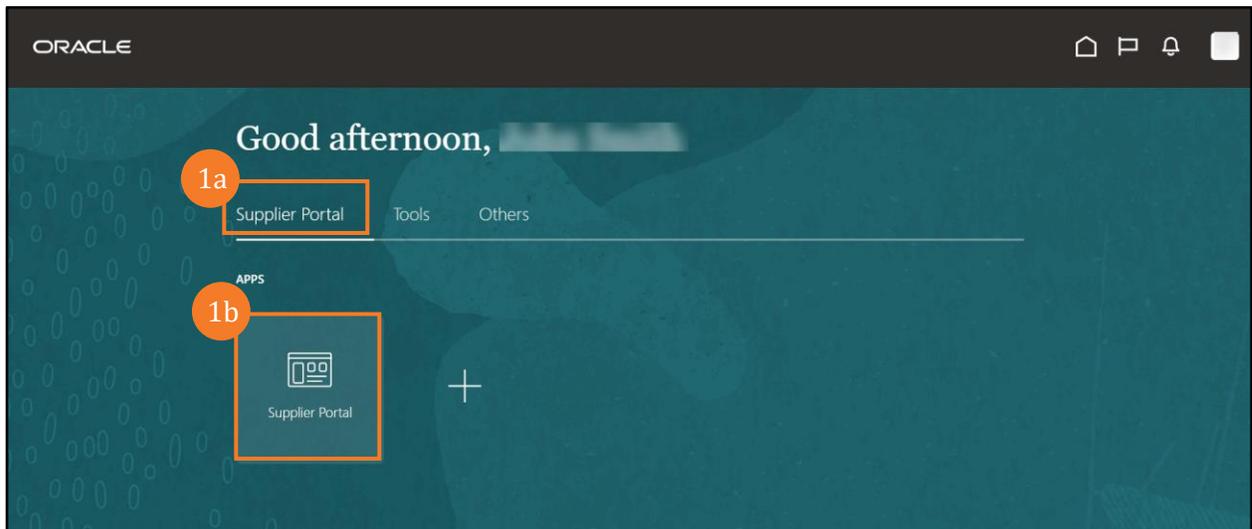
2. The Supplier Portal page is displayed. Click the Manage Orders hyperlink from the Orders section of the Tasks list.
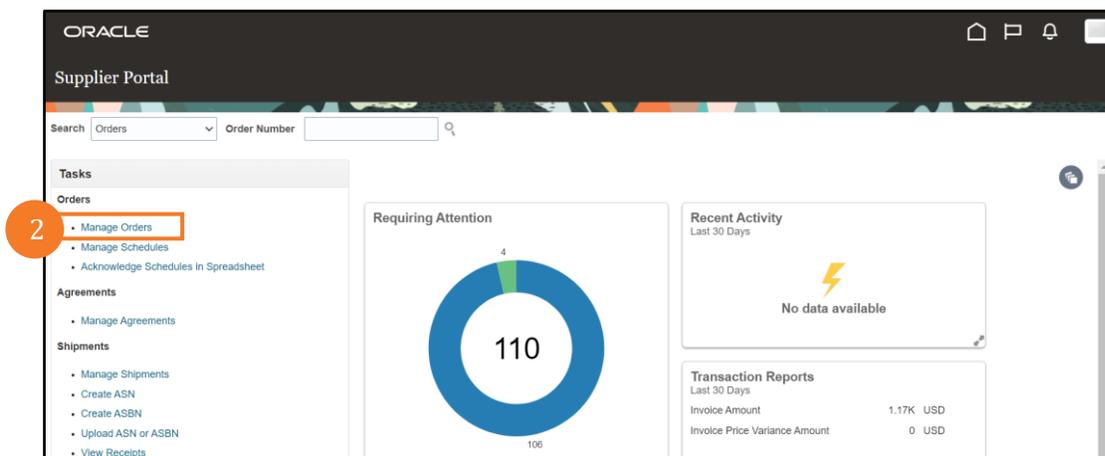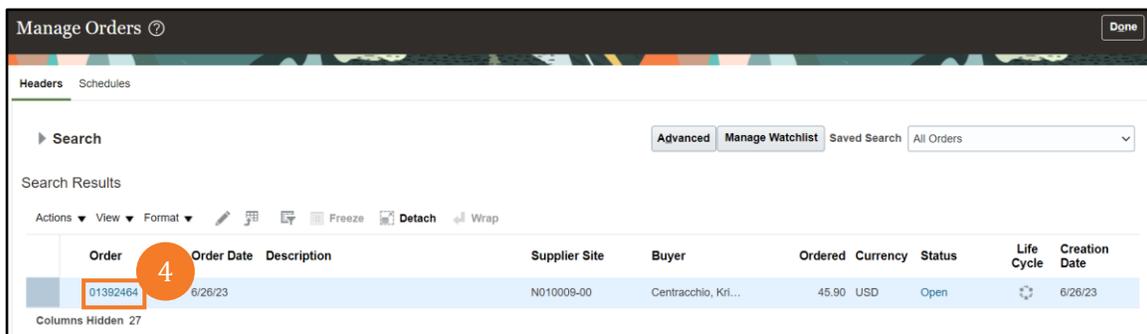
3. The Manage Orders page is displayed.
   a. Enter the appropriate value in the required Search field. For this example, we have entered a PO number in the Order number field.
   b. Click the Search button.

   Note:
   - If you do not have specific values available, you can do a blank search, without entering any values and clicking the Search button.
   - The following are the different PO Header Statuses:
     o Open - The order has been placed, but the quantity is yet to be received by the buyer.
     o Closed for Receiving - The reception of order quantities is completed.
     o Closed for Invoicing - The order quantities received have been successfully invoiced.
   - To search for a PO (includes and does not include a release) refer to the *Searching for Material or Service POs and Invoices in Oracle Supplier Portal* job aid.
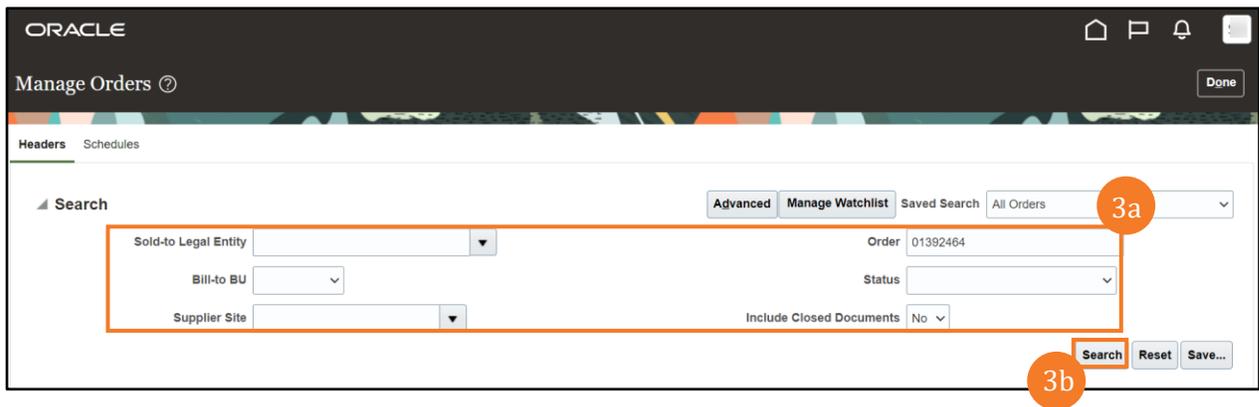
4. The Search Results are displayed. Click the Order hyperlink.

5. The Material Purchase Order page for the selected PO is displayed.
   a. Click the Actions drop-down menu.

b. Select the Edit option from the list.
   Note:
   - There are two ways to identify the PO types:
     o On the Manage Order page, click the Advanced search button and in the Document Style field populate the required PO type (Material PO, Service PO, etc.).
     o Once you open a PO, the type of the PO is displayed on the top left corner of the PO page. In this example, the top left corner displays Material Purchase Order: 01392464.
   - The following are the different views visible to a Supplier:
     o View Document History - It displays PO creation details such as Action, Performed By, Action Date, and Additional Information.
     o View Change History - It displays any changes made to a PO by a supplier that does not create any revision in the PO.
       For example, the below changes will be reflected in the Change History view:
       - Change orders where the only update is the change Description
       - All rejected change orders
     o View Revision History - When a change order creates a revision to a PO, it is displayed under the Revision History view. Every revision made to a PO will have a change history, but all changes made to a PO will not have a revision history.
   For example, the below changes will reflect in the Revision History view:
       - All approved change orders
       - Approved change orders created to a PO for Quantity, Price and Promised Delivery Date.

6. The Edit Change Order page is displayed.
   a. Scroll down to the Lines tab, you can make changes to Quantity, Price and populate the Change Reason for any of the changes made, as required. For this example, we have changed the Quantity from 7 to 6.
   b. Once you have made the required changes update the change description in Description field at the top of the page. For this example, we have written Quantity has been updated.
   Note: A supplier can also make updates to the price if in case of any pricing adjustments.
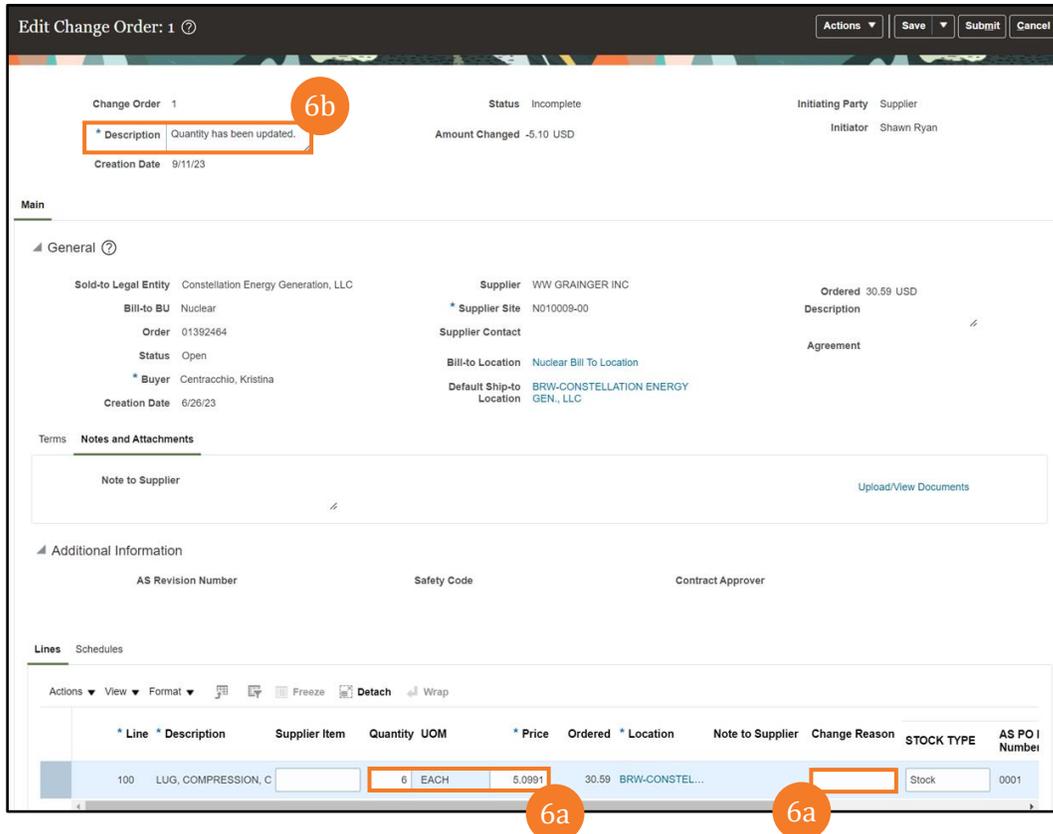
7. You can also make changes to the schedule. You can split a schedule, delete an existing schedule, and export a schedule to Excel. For example, if you need to split the delivery of a certain quantity of items and deliver them on separate dates, follow the below steps to split the schedule.
   a. Click the Schedules tab.
   b. Click the Actions drop-down menu.
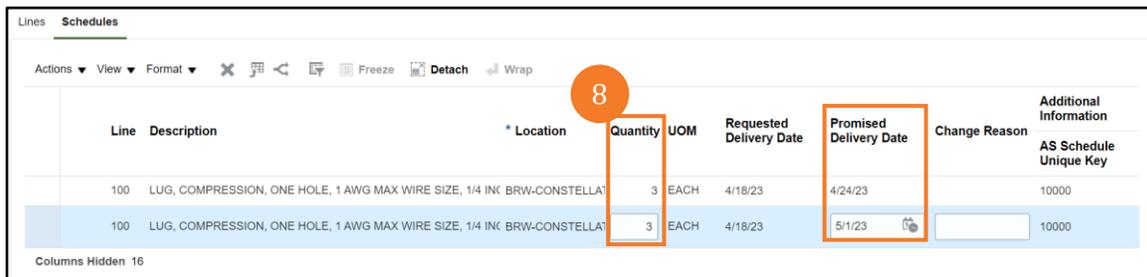   c. Click the Split option from the list.
      Note:
      - If there is more than one main line, you are required to click on that row before clicking on Split.
      - A schedule can be split only for the main lines and not for Line Sublines or Header Sublines. (You can distinguish between the main line and subline by adding the line Type column from the View drop down menu. Schedule should not be split for lines that have Type – Subline against them.)
   - AAA messages are sent to the buyer to notify them of a change request.

8. Two lines are displayed now for the same schedule. You can update the details on them as required. For this example, we have split the Quantity of 6 into the two lines (3 Each) and updated the Promised Delivery Date for the second line.
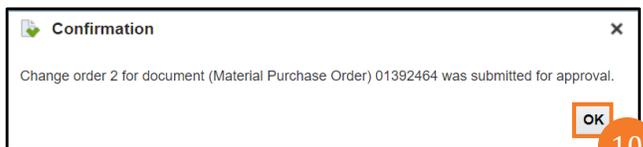
9. Once the required changes have been made
   a. Update the Description field with the changes made. For this example, we have written Schedule has been split and Promised Delivery Date has been updated.
   b. Click the Submit button to submit the change order.
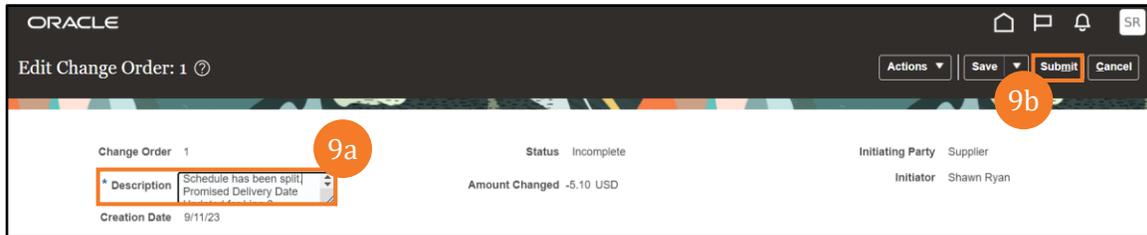
10. The Confirmation pop-window is displayed. Click the OK button.

Note: In case of rejection of a change order by the buyer, the change order status in the supplier portal will be Cancelled.

You have successfully completed the steps to submit a change order request against a Material PO on the Supplier Portal.