Supplier Portal – Transactions (for Suppliers)

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

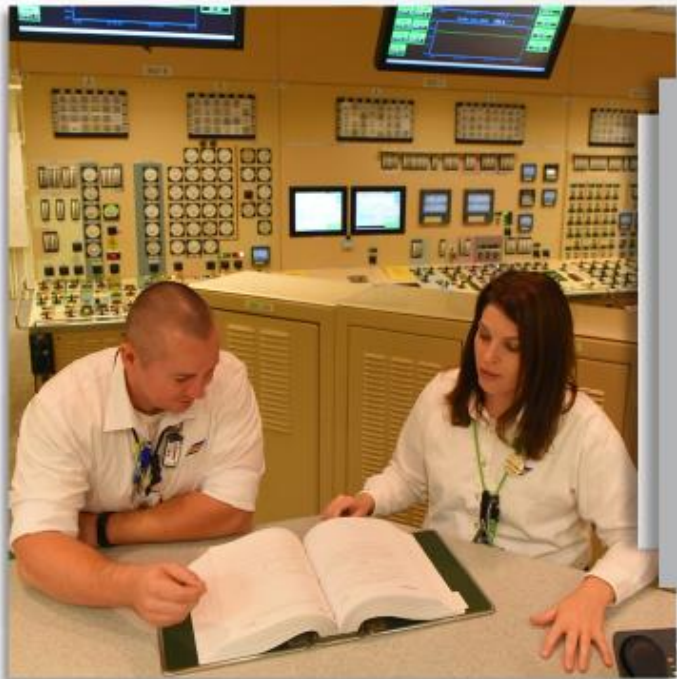Start

Course Navigation Instructions

Let us look at how to navigate through this course.

Course Details

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

This course will enable you to search for Purchase Orders (POs) and Invoices. It will guide you on how to submit change requests against material POs, create invoices, and perform other transactions in the Supplier Portal.

It will take approximately 20 minutes to complete this course.

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Course Objectives

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

- Search for Purchase Orders (POs) and Invoices

- Submit change requests against material POs in Supplier Portal

- View receipts

- Create an invoice in Supplier Portal

- View payments

- Provide an overview of Supplier Inactivation

APOLLO

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Key Terms

The key terms used in this course are listed below:

Key Term	Description
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.
Purchase Order	Purchase Order (PO) is a procurement document used by Constellation for the purpose of procuring both Signature and Non-Signature based Materials.
Invoice	Itemized list of materials rendered with an account of all costs. Oracle Cloud ERP lets you capture attributes of the invoice.
Bill of Lading	Document used in shipping and logistics to acknowledge the receipt of goods for shipment. It serves as a receipt of goods, a contract for the transportation of goods, and a document of title.
Consumption Advice	It refers to a document or notification provided by a buyer to a supplier to inform them about the actual consumption or usage of goods that were previously ordered or delivered.

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Key Terms

The key terms used in this course are listed below:

Key Term	Description
Context Value	A context value is used to determine which context-sensitive segments to show in a Descriptive Flex Field (DFF). A DFF can get context information from either a field somewhere on the form, or from a special field (a context field) inside the DFF pop-up window.
Document Number	A unique identifier assigned to various documents within the procurement and supplier management process. The document number serves as a reference for tracking, identifying, and managing documents such as POs, invoices, contracts, etc., within the system.
Document Style	Refers to the various types of purchase order documents available on the Supplier Portal, such as Service PO, Service PO Signature, Material PO, etc. It pertains to the visual or formatting aspect of purchase order documents.
Document Type	Classification or category of a PO. They are used to categorize POs based on their purpose, intended use, or the type of goods being procured.
Header Sublines	It is generally used to manage complex purchase orders or transactions with multiple levels of details.

Key Terms

The key terms used in this course are listed below:

Key Term	Description
Invoice Status Types	Helps track and manage the lifecycle of invoices submitted by suppliers. These statuses provide visibility into the progress of invoices, from submission to payment approval. For example, Approved, In Process, Canceled, etc.
Main Lines	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.
Match Approval Level	It refers to the concept of matching invoices to POs for approval. In Oracle's procurement module, matching is the process of comparing the details on an incoming invoice to the purchase order and the receipt of goods or services.
Note	An area within the portal where users can add and view notes related to specific procurement transactions, such as POs or invoices. These notes can serve various communication and documentation purposes.
Number of Supplier Packing Units	The quantity or count of packaging units provided by a supplier for a specific product or shipment.

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Key Terms

The key terms used in this course are listed below:

Key Term	Description
Organization	Supplier's company or business entity.
Packing Slip	A document included with shipment of goods that provides information about the contents of the package, allowing the recipient to verify the receipt of the ordered items.
Payee Site	Payee Site refers to the specific location or site within a supplier's organization to which payments should be made.
Payment Date	Payment date is determined by the payment terms agreed upon between the buying organization and the supplier. Payment terms specify the period within which the buyer needs to make the payment to the supplier after the invoice date.
Payment Document	Payment document refers to the electronic or physical document generated by the buying organization's accounts payable department to notify the supplier about a payment.

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Key Terms

The key terms used in this course are listed below:

Key Term	Description
Payment Status	Payment status refers to the current state or condition of a payment transaction. It indicates whether a payment has been processed, is pending, or has encountered any issues.
Payment Type	Payment Type refers to the method used to process payments to suppliers.
Receipt Date	Receipt Date refers to the date on which goods or services were received by the buying organization.
Receipt Number from AS	Receipt Number refers to a unique identifier or document number associated with the receipt and acceptance of a physical asset.
Service Purchase Order/Contracts	Service Purchase Order (PO) refers to a procurement document issued by a buying organization to a supplier for the provision of services. They are referred to as Contracts by Constellation and are often used interchangeably.
Ship Date	Ship Date refers to the date on which goods are shipped from the supplier to the buyer. It helps in tracking the movement of goods, scheduling deliveries, and managing inventory levels.

Key Terms

The key terms used in this course are listed below:

Key Term	Description
Shipment	Shipment refers to the process of sending goods from a supplier to a buyer or customer. It helps manage, track, and communicate details related to shipment.
Shipping Method	Shipment Method refers to the specific way in which goods are transported or delivered from a supplier to a buyer or customer.
Line Sublines	Line Subline 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.
Supplier Site	It refers to a specific location or address associated with a supplier within the procurement and supplier management modules.
Waybill	Waybill refers to a document issued by a carrier that details the shipment of goods and serves as a receipt of the goods for shipment. The waybill contains essential information about the cargo, including the type of goods, quantity, destination, and other relevant details.

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Ways of Working with Constellation

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

Supplier Portal is utilized as a repository for all your information, and you can make updates to this information as required. Certain updates will require Constellation review.

You are required to maintain your profile and update it as needed in the Supplier Portal. However, if you do not have access to the Supplier Portal, you are required to maintain it using the Supplier Maintenance Form (SMF).

You along with your respective Constellation points of contact will need to manage your onboarding process and your company profile updates.
Note: The Constellation preferred way is that the you manage your own information in the Supplier Portal.

Supplier Portal - Transactions
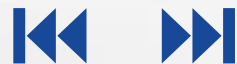
Overview of Supplier Portal Transactions

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Supplier Portal is used to:

Search for POs, Contracts and Invoices	Submit Change Requests against Material PO's	View Receipts	Create Invoices	View Payments

You can search for the POs, Contracts and invoices in the Supplier Portal

You can submit change requests against Material POs.

You can view the receipts and CPAs for Materials and Service POs

You can create invoices.

You can view the completed/pending payments in the Supplier Portal.

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Important Items to Note

Below are some key pointers to note when working on the Supplier Portal:

- Revision numbers visible in the Supplier Portal many not match the revision number found on the purchase order or contract you received from us. This is because not all revisions made in our Procurement system need to feed to our Accounts Payable system.

- In some panels of the Supplier Portal, you will notice references to "Business Unit." Nuclear will be the selection if you are providing materials to one of our Nuclear stations or businesses. Non-Nuclear will be the selection for all other stations and businesses.

- You will continue their current means of communications with your Constellation buyers and category managers to obtain full Contract content, for example, to obtain your Statement of Work "SOW" and Terms and Conditions "T&Cs". There is no provision for contract data via the Supplier Portal.

- When your contracts require a Contact Payment Authorization "CPA", the CPA must be created and approved before you can email in an invoice or create an invoice via the Supplier Portal.

- Change Orders via the Portal are not allowed. These must be communicated with your Constellation buyers, category managers or project manager. Revisions and amendments must originate from our purchasing sytems to feed to our Accounts Payable system.

- In the case where you are signed up to use the Supplier Portal, be sure to set up your account to receive notifications when new or revised material POs are available.

- Acknowledgements are not required. This feature is disabled.

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Search for POs and Invoices – Basic Search

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Search for POs, Contracts and invoices using Basic or Advanced search criteria. Below is an image of the Manage Orders screen using Basic Search criteria.

Basic Search
Basic Search helps you to search in Oracle using standardized, out of the box fields. You will need to know the exact values to fill in the fields to search for the required PO and invoice.

Note: Once you have found your Materials Purchase Order in Oracle, look for a highlighted URL which will open a printed version of your PO for your viewing.

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Search for POs and Invoices – Advanced Search

Search for POs, Contracts and invoices using Basic or Advanced search criteria. Below is an image of the Manage Orders screen using Advanced Search criteria.

Advanced Search

Advanced Search enables you to add additional fields to the search criteria. You can search for the required POs and invoices even if you do not know the exact value using Operators such as Starts With, Equals, etc.

Note: For detailed steps on search for POs and Invoices refer to the Searching for Material or Service POs and Invoices in Oracle Supplier Portal job aid.

Submitting Change Request Against Material POs

Below are the change requests than can be created:

QUANTITY	PRICE	PROMISED DELIVERY DATE	SCHEDULE SPLIT
• Request changes to quantity of items by increasing or decreasing the quantity ordered on the PO • Can be used for partial shipments or backorder quantities	• Request changes to the unit prices associated with the PO • Can be used for pricing adjustments	• Request changes to the delivery date • Can be used to both expedite or delay delivery	• Request changes to the delivery schedule • Can be used to split the delivery of items into multiple schedules, if the quantity is more than 1

Note:
- A schedule can be split only for the main lines and not for Line Sublines or Header Sublines.
- For the detailed steps to submit a change request for material POs, refer to the Submitting a Change Request Against a Material PO on the Supplier Portal job aid.

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View Receipts

Viewing receipts in the Supplier Portal of Oracle is a crucial task to track and verify the goods suppliers have provided. This process helps ensure accurate invoicing and payment, as well as maintain transparency and accountability in business transactions. To view the receipts, login to Oracle Cloud.

View Receipts (Contd.)

The Supplier Portal page is displayed.

Click the View Receipts hyperlink from the Shipments section of the Tasks list.

View Receipts (Contd.)

The View Receipts page is displayed.

Search for the required receipt by entering a value in any of the search criteria fields. For this example, we have entered the Purchase Order number.
Note: It is mandatory to enter a value in at least one of the fields marked by **

Click the Search button.

Note: The PO number in the above screenshot represents a Non-signature Service PO where the 1st 8 digits of the PO would be the non-signature contract (agreement) number, the next 5 digits with the REL prefix is used for the release number of the non-signature contract from Asset Suite (AS9) and the last 8 digits with prefix CPA would be the Contract Payment Authorization number from AS9.
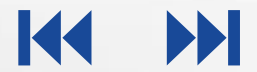
View Receipts (Contd.)

The View Receipts page shows the relevant Search Results.

Click the Receipt number hyperlink.
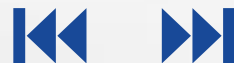
View Receipts (Contd.)

The Receipt page for the selected receipt is displayed.

8 You can, click the View Transaction History button.

7 Review the Receipt details from the Summary, Additional Information and Lines sections as per your requirement.

View Receipts (Contd.)

The Transaction History page for the selected receipt is displayed. You can view and access historical transaction data related to the selected receipt. The Transaction History captures the details of the receiving transaction ID tied to the receipts and shows details such as the transaction amount and timestamp.

10 Click the Done button to return to the Receipt page.

9 Review the inventory organization details (if any), like amount received, quantity delivered, etc.

View Receipts (Contd.)

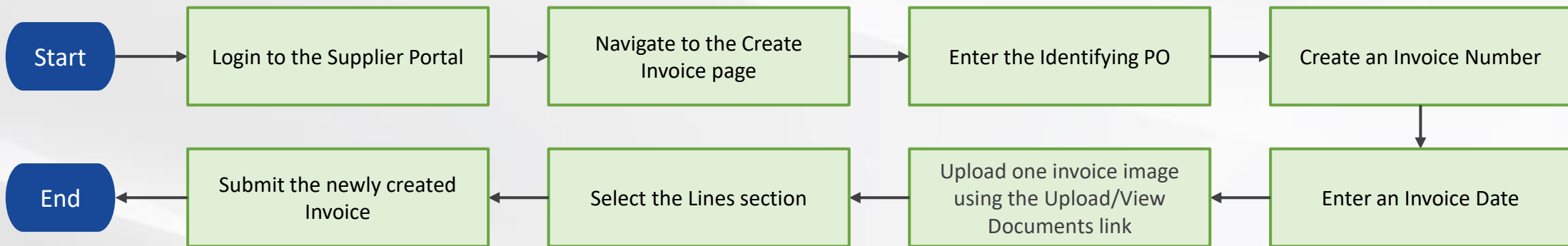The Receipt page for the selected receipt is displayed again.

Creating an Invoice on the Supplier Portal

APOLLO

An invoice created in the Supplier Portal must be matched to a purchase order (PO). Creating an Invoice that is matched to a PO in the Supplier Portal of Oracle will help you:

01 To ensure that the invoice accurately reflects the products or services delivered according to the purchase order

02 To maintain accurate financial records and streamlining the payment process

Below are the steps you can follow to create an Invoice in the Supplier Portal.

```
Start → Login to the Supplier Portal → Navigate to the Create Invoice page → Enter the Identifying PO → Create an Invoice Number
                                                                                                                    ↓
End ← Submit the newly created Invoice ← Select the Lines section ← Upload one invoice image using the Upload/View Documents link ← Enter an Invoice Date
```
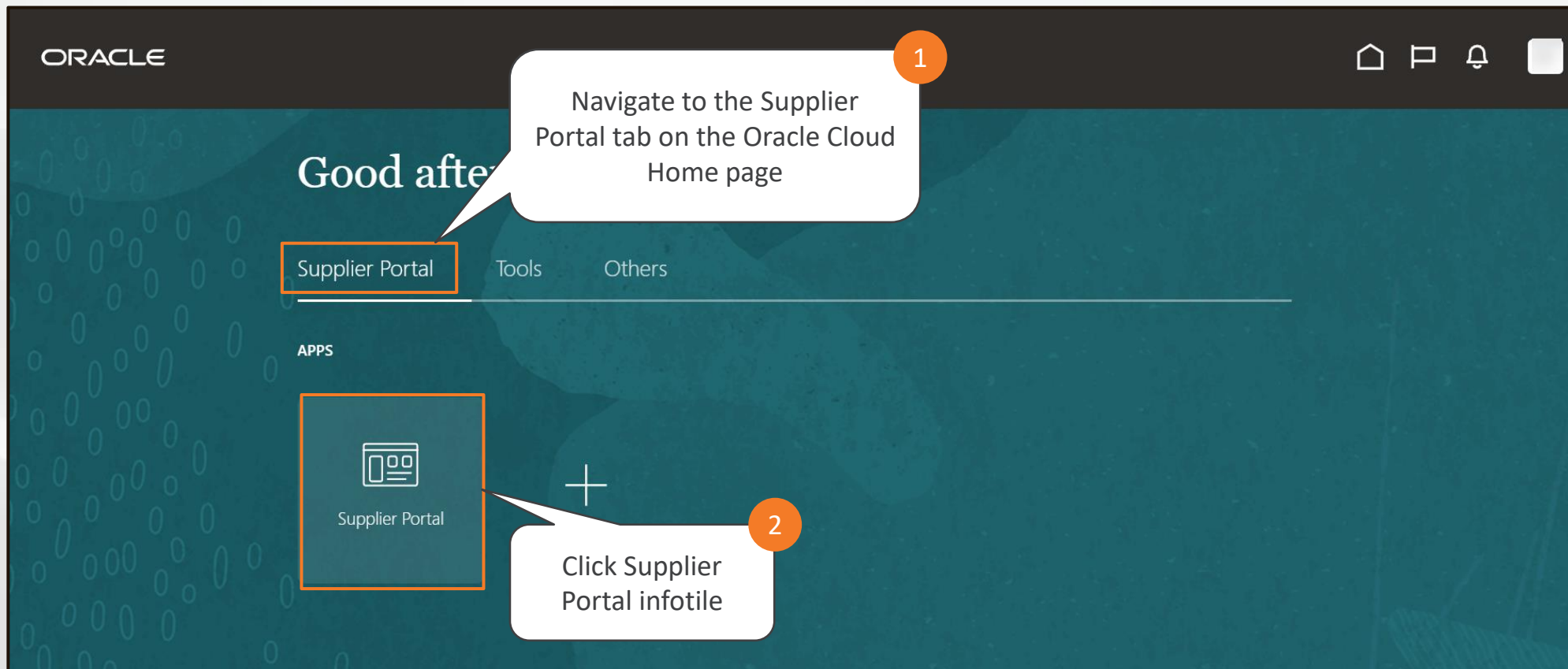
Note:
- For the detailed steps to create a PO-matched invoice refer to the Invoice Creation in Supplier Portal job aid.
- In case of any queries related to the tax calculation of an Invoice, a supplier can reach out to individuals within the AP team or the Supply Sourcing team in Constellation.

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View Payments

Viewing payments in the Supplier Portal of Oracle is a crucial task to verify that they have received payments for the products or services they have delivered. Access to payment information helps suppliers manage their cash flow effectively. To view the receipts, login to Oracle Cloud.

View Payments (Contd.)

The Supplier Portal page is displayed.

3 Click View Payments infotile
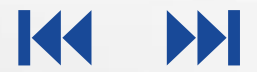
View Payments (Contd.)

The View Payments page is displayed.

Search for the required payment by entering a value in any of the search criteria fields. For this example, we have populated the Payment Number.

Note:

- In the event of unavailability of specific details such as Payment Number, you can populate the Supplier field to get a list of all payments associated with the supplier.
- It is mandatory to enter a value in at least one of the fields marked by **

4

5

Click the Search button.
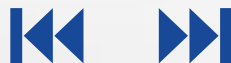
View Payments (Contd.)

The View Payments page shows the relevant Search Results.

6

You can look up the status of a payment from the Payment Status column in the Search Results page.

Search Results

View ▼ | Detach

Payment Number	Payment Date	Payment Type	Invoice Number	Supplier	Supplier Site	Payment Amount	Payment Status	Remit-to Account
88	9/20/23	Payment Process Request	INV-914	WW GRAINGER INC	NG8025-01	1,449.70 USD	Negotiable	

6

Click the Payment Number hyperlink of the required invoice. Note: Alternatively, you can also click the Invoice Number hyperlink to open and view the payment details.

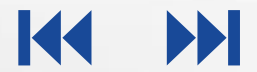The Payment page for the selected row is displayed.

Payment: 88 | Done

Business Unit	Nuclear	**Payment Amount**	1,449.70 USD
Payee	WW GRAINGER INC	**Payment Date**	9/20/23
Payee Site	NG8025-01	**Payment Type**	Payment Process Request
Address	COMMERCIAL SUPPLY, 1017 SW JEFFERSON AVENUE, PEORIA, IL 616053948	**Remit-to Account**	
Payment Status	Negotiable	**Payment Document**	

7

Click the Invoice Number hyperlink, if required, to open and view the Invoice details.

Paid Invoices

Number	Invoice Date	Type	Purchase Order	Receipt	Consumption Advice	Paid Amount	Invoice Amount	Invoice Status	Due Date	Paid Status
INV-914	9/14/23	Standard	0000000000009			1,449.70 USD	1,449.70 USD	Workflow ...	9/14/23	Fully paid

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View Payments (Contd.)

APOLLO

The Invoice page for the selected invoice is displayed. Review the details as needed

Invoice: INV-914   Done

8 Click the Done button.

Business Unit	Nuclear
Legal Entity Name	Constellation Energy Generation, LLC
Supplier or Party	WW GRAINGER INC
Supplier Site	NG8025-01
Address	COMMERCIAL SUPPLY, 1017 SW JEFFERSON AVENUE, PEORIA, IL 616053948
Invoice Date	9/14/23

Invoice Amount	1,449.70 USD
Unpaid Amount	0.00 USD
Payment Currency	USD
Tax Control Amount	

Invoice Type	Standard
Description	
	Upload/View Documents

Lines Payments

Items

View ▼   Detach

Line	* Regime	* Tax Name	Tax Jurisdiction	* Tax Status	* Rate Name	Percentage	P
1	VERTEX US TAX	STATE	ILLINOIS	Standard	STD	6.25	

Totals

Tax charges summary

Inclusive Tax	0.00
Self-Assessed Tax	90.61

Items	1,449.70
Freight	0.00
Miscellaneous	0.00
Tax	0.00
Subtotal	1,449.70
Less Inclusive Prepayments	0.00
Remaining Amount	✅
	0.00
Invoice Amount	**1,449.70**
Less Withheld Tax	0.00
Less Exclusive Prepayments	0.00
Less Retainage	0.00
Total Due	**1,449.70**

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View Payments (Contd.)

You can also use Advanced search fields to view payment details of a specific Invoice. Repeat steps 1 to 3, to navigate to the View Payments page.

View Payments (Contd.)

The additional search fields are displayed.

View Payments (Contd.)

The invoice Number field is now displayed.

View Payments (Contd.)

The View Payments page shows the Search Results listing all the payments associated with the Invoice.

You can look up the status of a payment from the Payment Status column in the Search Results page.

Search Results

View ▾ ▦ Detach

Payment Number	Payment Date	Payment Type	Invoice Number	Supplier	Supplier Site	Payment Amount	Payment Status	Remit-to Account
88	9/20/23	Payment Process Request	INV-914	WW GRAINGER INC	NG8025-01	1,449.70 USD	Negotiable	

6 Click the Payment Number hyperlink of the required invoice. Note: Alternatively, you can also click the Invoice Number hyperlink to open and view the payment details.

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Different Payment Statuses

A payment will always have a status throughout the processing period, and this will be visible in the Supplier Portal to all Suppliers. The suppliers will no longer need to reach out to their business contact to check on payment status.

Below are the two standard payment statuses that will be visible:

Status:	Description:
Negotiable	Status when a payment is created in Oracle.

| Status:	Description:
Voided	Status when a payment is cancelled and is no longer valid.

Note: While there are multiple seeded statuses in Oracle, once the payment is created its status will be Negotiable. And if the payment(s) is cancelled the status changes to Voided.

Supplier Inactivation – Overview

A supplier can get inactivated automatically at any point of time based on various reasons such as duration of no active transaction with Constellation. Let's look at few of the examples:

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If the Supply supplier has not transacted with Constellation for 24 months, then the supplier gets inactivated
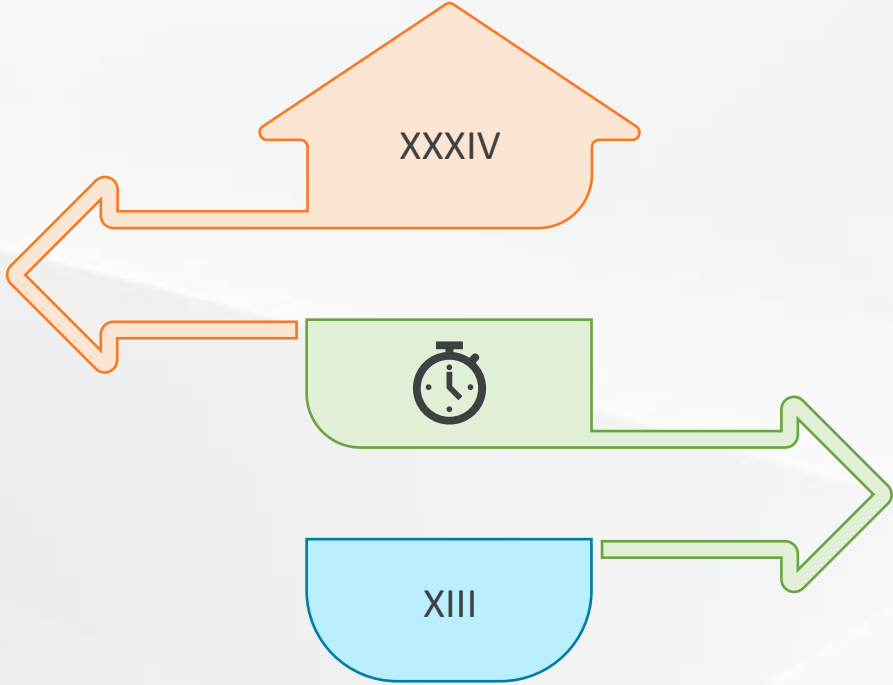
If the Voucher supplier has not transacted with Constellation for 13 months, then the supplier gets inactivated

XIII

Note: In case you have been inactivated and would like to be reactivated, contact your respective Constellation Procurement contact and/or supplierMgmtTeam@constellation.com.
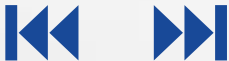
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Key Takeaways

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

01 The Supplier Portal is a self-service tool Suppliers use to submit an invoice to Constellation, track payments and manage their contact information.

02 Basic Search helps you to search for POs, Invoices and Payments using standard Oracle fields. Use this method when you know the exact values to enter.

03 Advanced Search enables you to add additional fields to the search criteria as well as search if you do not know the exact value.

04 Change requests can be raised for Material Purchase Orders (POs) in the Supplier Portal.

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Key Takeaways

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

05 Viewing receipts in the Supplier Portal of Oracle is a crucial task to track and verify the goods you have provided to Constellation have been received.

06 A PO-matched invoice refers to an invoice that has been matched to a purchase order (PO) to ensure accuracy and validity before it can be processed for payment.

07 In case of any queries related to the tax calculation of an Invoice, a supplier can reach out to the appropriate individuals within Constellation.

08 A supplier can get inactivated automatically at any point of time based on various reasons such as duration of no active transaction with Constellation.

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Supplemental Training Resources

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

Sl. No.	Job Aid
1	Searching for Material or Service POs and Invoices in Oracle Supplier Portal
2	Submitting a Change Request Against a Material PO on the Supplier Portal
3	Invoice Creation in Supplier Portal

THANK YOU

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