Constellation

APOLLO

Supplier Onboarding and Registration (for Suppliers)

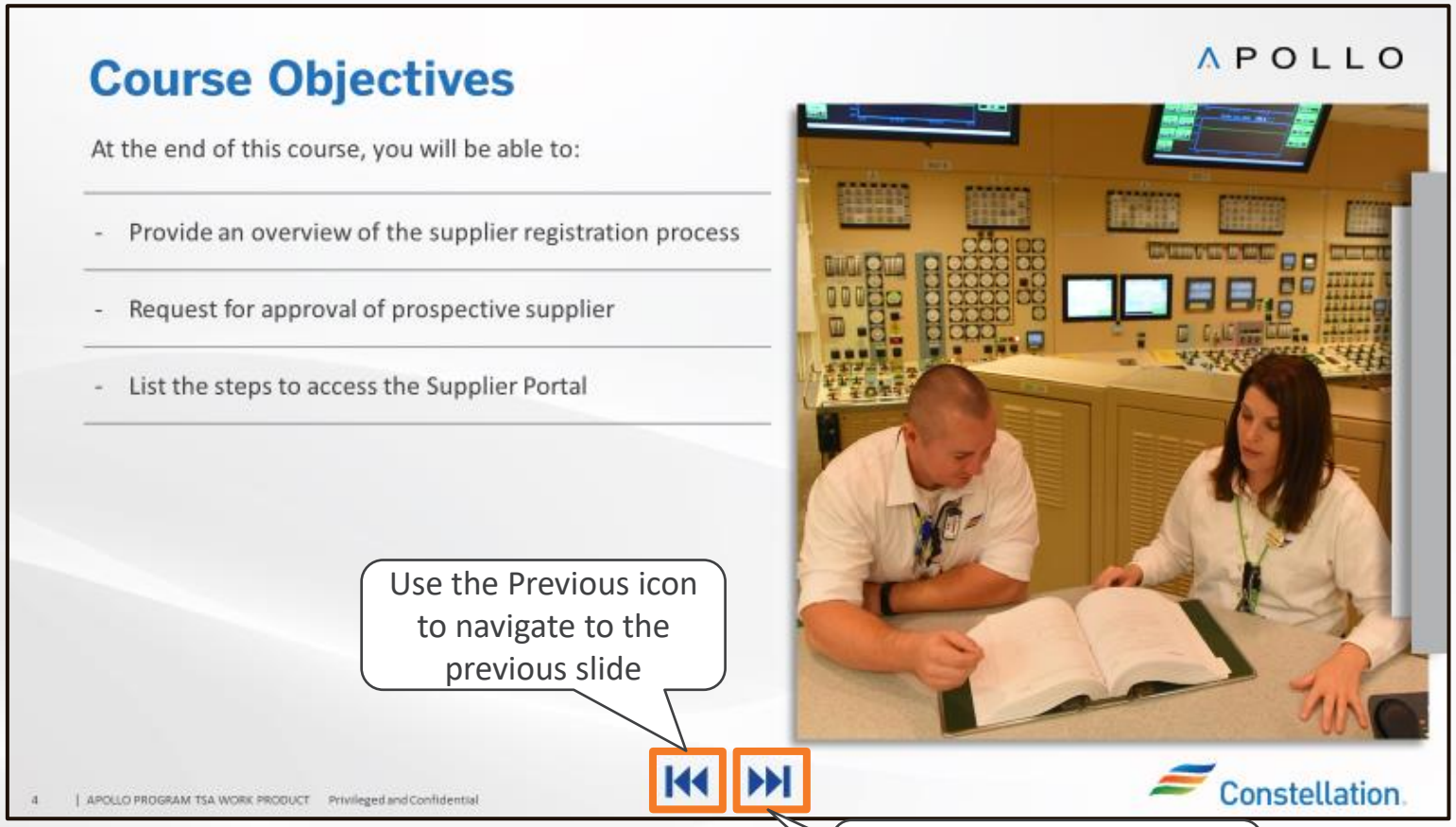
*Click the **Start** button to begin the course!*

Start

Last Updated – 1/22/24

Course Navigation Instructions

Let us look at how to navigate through this course.



Course Details

Welcome to the Supplier Onboarding and Registration (for Suppliers) course!

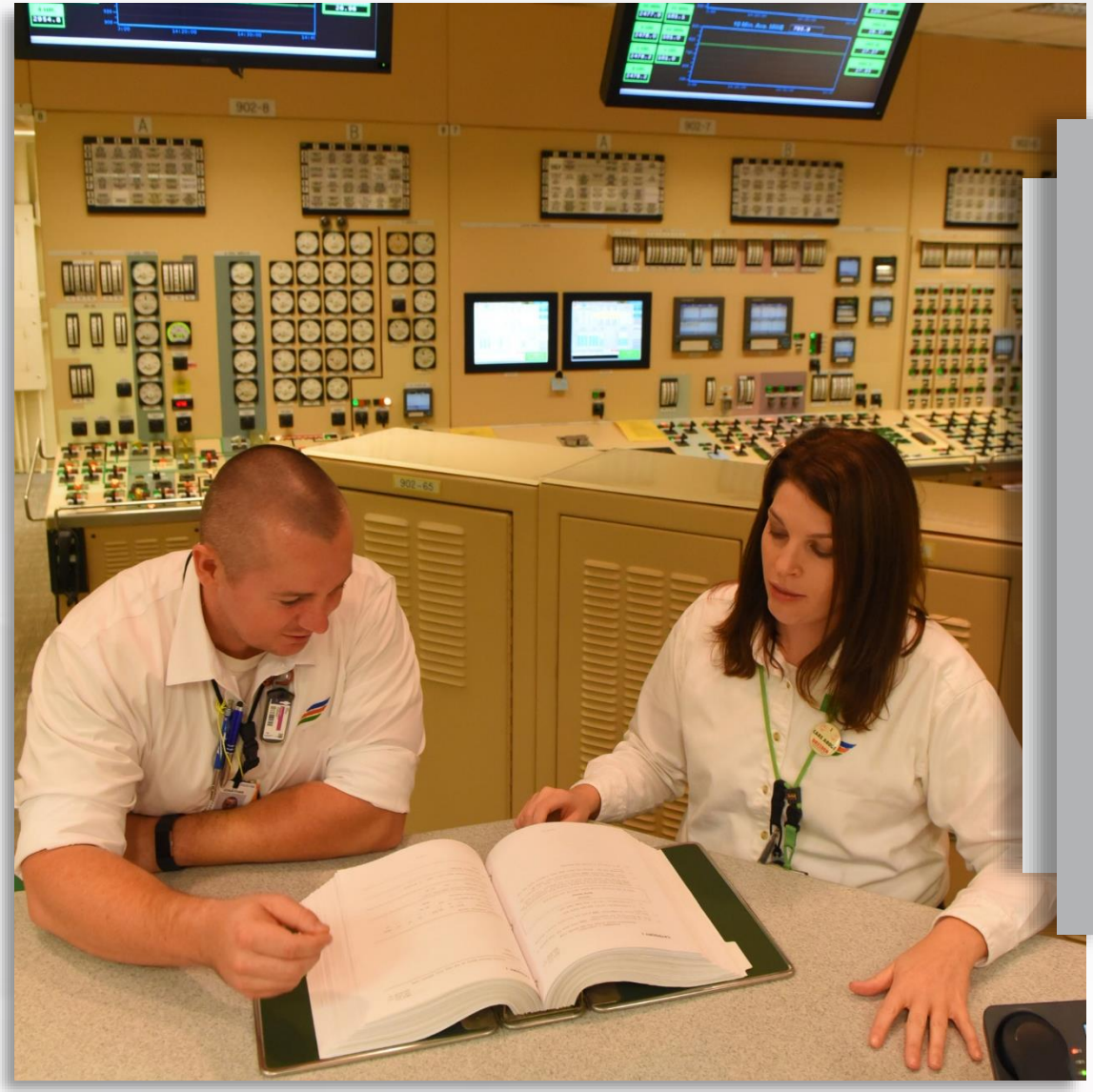
This course provides information on the supplier registration process. It will guide you on the Save for Later email notification and the process of receiving Supplier Portal access.

It will take approximately 45 minutes to complete this course.

Course Objectives

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

- Provide an overview of the supplier registration process
- Request for approval of registration
- List the steps to access the Supplier Portal



Key Terms

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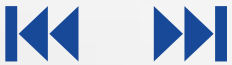
The key terms used in this course are listed below:

Key Term	Description
Alternate Name	Alternate Name is an additional identifier information that can be used to identify the supplier.
Business Classification	Business Classification is a categorization of suppliers based on their characteristics, such as race, gender, sexual orientation, disability, or culture.
Certifying Agency	Certifying Agency is an authorized organization that issues business classification certifications for suppliers.
Constellation Point of Contact	Constellation Point of Contact is the designated individual from Constellation whom the Supplier can contact.
Legal Structure	Legal Structure is a recognized category of organization from a legal perspective that influences how the business will operate regarding taxation, recordkeeping. For example - 501C5 LABOR UNION, TAX EXEMPT CHARITY, etc. It is responsible for the company's compliance with the law.



Constellation

Key Terms (Contd.)

APOLLO

The key terms used in this course are listed below:

Key Term	Description
Notification	Notifications are of two types for suppliers - Business Process Management (In-app) notification and Email notifications. Business Process Management notification enables business users to access and act on tasks assigned to them. Email notifications notify suppliers or business users of the important information or updates on action items through email.
Remittance Advice	Remittance Advice notifies the suppliers once the payments are processed and sends payment related information such as payment amount, payment date, invoice number, etc.
Supplier Industry Code (SIC)	SIC references a service agreement for non-residential service. This code is used to categorize service agreements for reporting purposes.
Supplier Type	Supplier Type is an attribute to categorize the suppliers. In Constellation, we have categorized suppliers into three types – Supply, Voucher and Voucher Exempt.

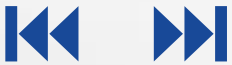
Constellation

Key Terms (Contd.)

APOLLO

The key terms used in this course are listed below:

Key Term	Description
Supplier Portal	Supplier Portal is the next generation application which provides a self-service solution bringing a holistic approach to supplier management. The Supplier Portal enables suppliers to view and manage their own company profile, view Purchase Orders (POs), invoices, payments, view and update expiring business classifications, and respond to supplier questionnaires.
TIN	TIN is an acronym for Taxpayer Identification Number. It 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. A TIN must be furnished on returns, statements, and other tax related documents.
Tax Registration Number	Tax Registration Number is a unique identifier for a supplier's tax information in a specific country.
Virtual Credit Card (VCC) Payment Method	VCC payment method is a way to pay for products and services online using a virtual credit card.



Constellation

Key Terms (Contd.)

The key terms used in this course are listed below:

Key Term	Description
W8	W8 is an IRS form that allows certain individuals and corporations outside the U.S. to claim an exemption from withholding taxes from income earned or derived in the U.S.
W9	W9 is an official form furnished by the IRS for employers or other entities to verify the name, address, and tax identification number of an individual receiving income.

Ways of Working with Constellation

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

- New suppliers register via new Supplier Registration link on Constellation webpage that will feed into an Oracle page
- The supplier must input all necessary information and register themselves

Suppliers will reach out to Constellation points of contact for queries related to the supplier registration process and supplier profile updates.

Constellation

Main Menu

Click each module number to navigate through the course.

Module Name		Duration
Module 1	Supplier Registration	30 minutes
Module 2	Access to Supplier Portal	10 minutes

Module:

1 2

Supplier Registration

Module Objectives

After completing this module, you will be able to:

- Provide an overview of supplier registration process
- Fill out the registration form
- Submit the Registration Request
- Review Save For Later email notification
- Submit additional information without creating a new request

MAIN MENU

Types of Suppliers

The different types of suppliers that perform transactions with Constellation are Supply, Voucher and Voucher Exempt suppliers.

Voucher Suppliers

Voucher suppliers register as payment-only suppliers. They do not require POs against the payments. Their payments can be done directly using invoices. Constellation typically uses this type of supplier to pay for speaker fees or make donations to political groups. Voucher Suppliers cannot charge sales taxes.

Supply Suppliers

Supply suppliers will require Purchase Orders (PO) and Contracts to create invoices against the payments.

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). Constellation typically use this type of supplier to pay for taxes, insurance, and rent.

Overview of Supplier Registration Process

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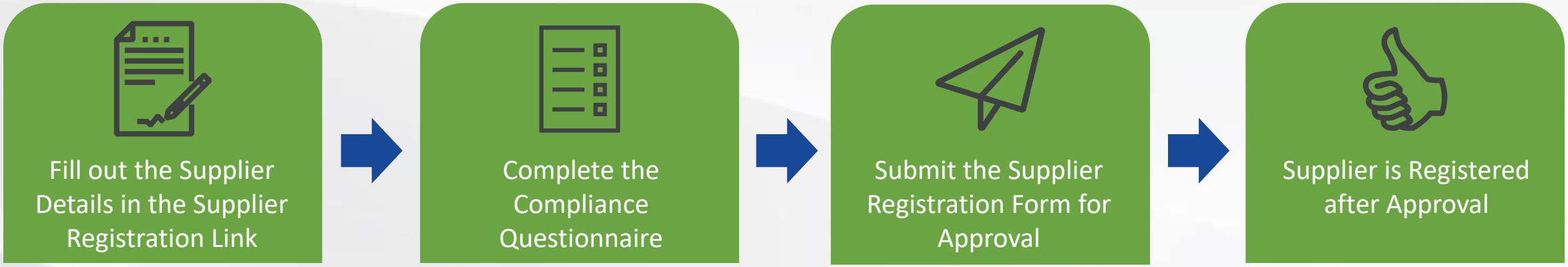
Suppliers will get registered to Oracle Cloud with the help of the Supplier Registration form link present in the Constellation website for Procurement Portal (for Supply suppliers) and Payment-Only Supplier (for Voucher and Voucher Exempt suppliers).

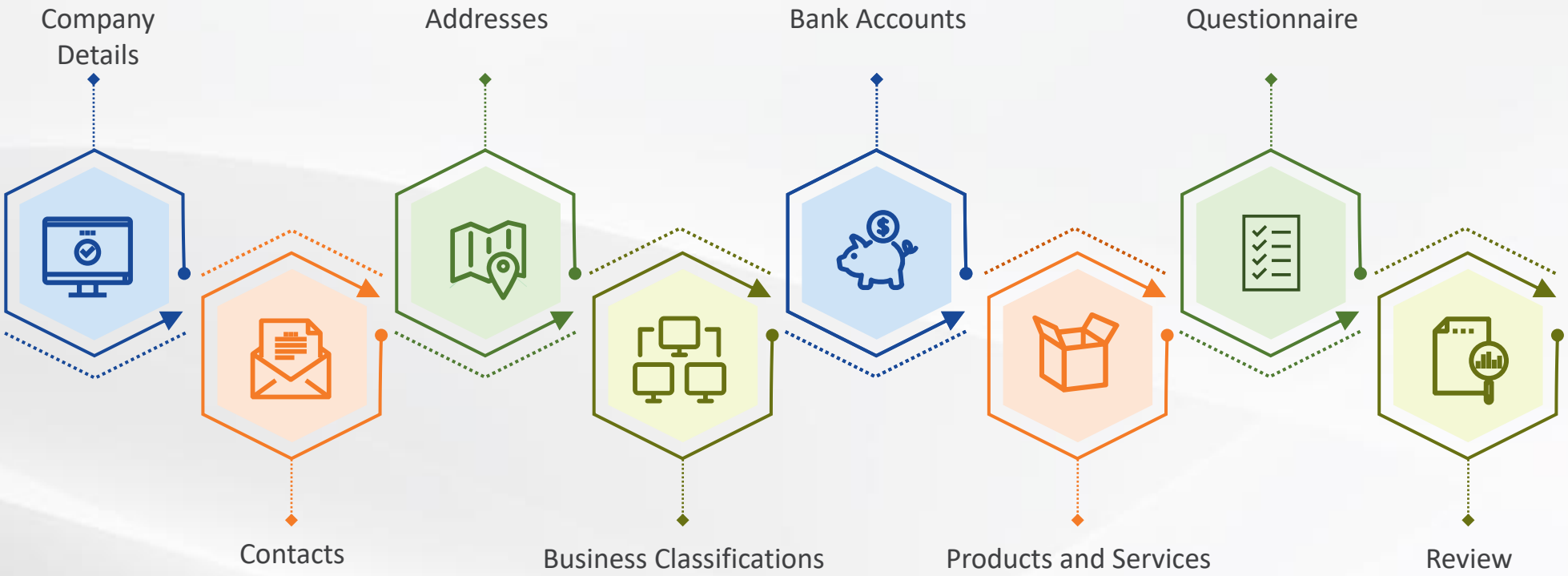
Let's look at the overview of the supplier registration process below.



Note: If you select the Supplier Type as Voucher Exempt, the VAQ compliance questionnaire will not be presented to you.

Supplier Registration Form

Let’s look at the overview of the Supplier Registration form and identify the fields that are required to be completed to provide supplier details.



Note: The detailed steps for filling out the Supplier Registration Form will be covered in the Filling Out Registration Forms job aid.

Register Supplier: Company Details

Below are the key fields that you need to fill in the Register Supplier: Company Details page of the Supplier Registration form.

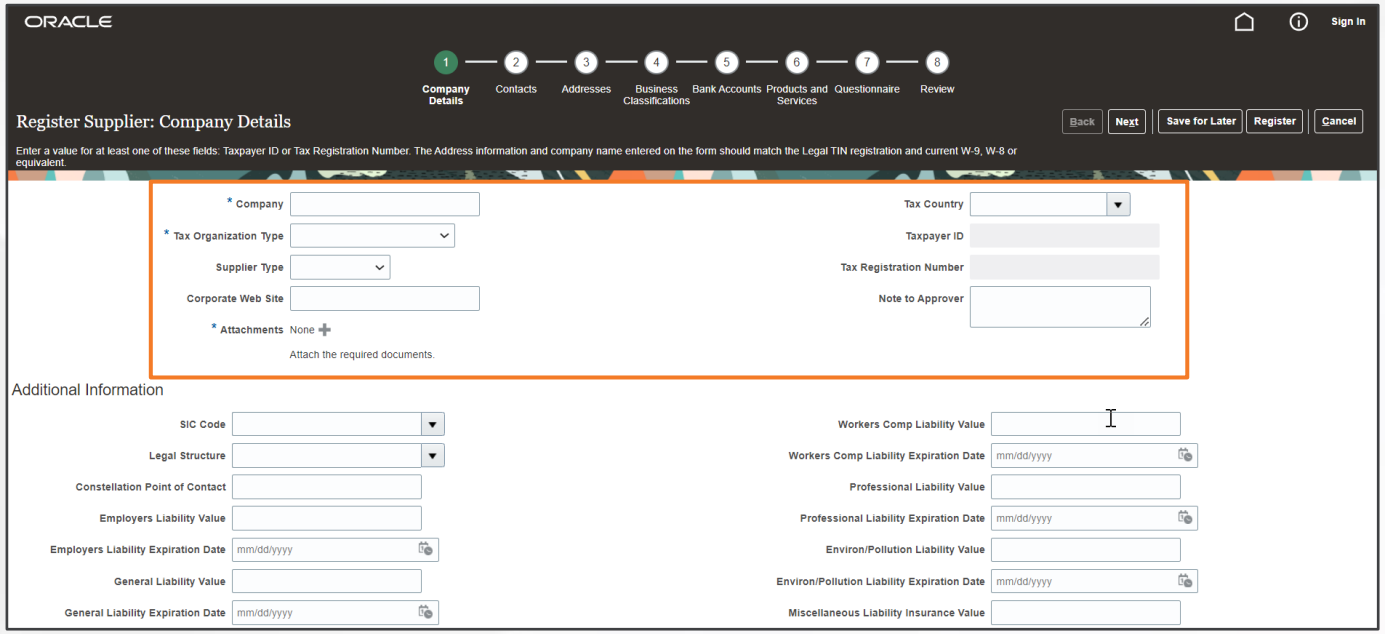
01 Company: Enter the name of the company to which the Supplier belongs.

02 Tax Organization Type: Enter the tax organization type of the company.

03 Supplier Type: Select the type of supplier from the Supplier Type drop-down.

04 Attachments: attaching a W9, W8 or equivalent tax form is mandatory or the registration will be rejected.

05 Taxpayer ID: Enter the Taxpayer ID after selecting the tax country in the Tax Country field.



Note: Company Name, Tax Organization Type and Taxpayer ID must match with the attached W8/W9.

MAIN MENU

Register Supplier: Company Details (Contd.)

Below are the key fields that you need to fill in the Additional Information section in the Register Supplier: Company Details page of the Supplier Registration Form.

06

SIC Code: Enter the required SIC code. It is mandatory to fill in the SIC Code for Voucher and Voucher Exempt suppliers.

07

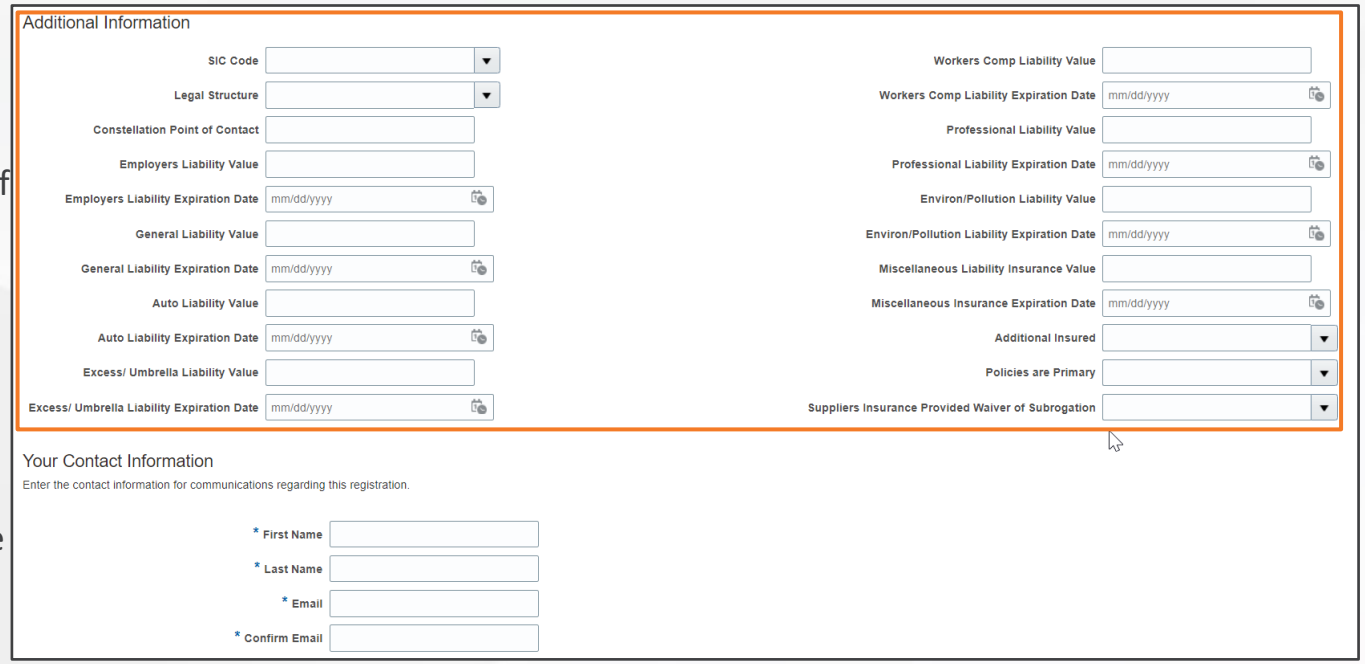
Legal Structure: Enter the legal structure of the suppliers to designate themselves as 501(c)(3), 501(c)(4), other tax exempt charity.

08

Constellation Point of Contact: Entering the name of a Constellation contact will facilitate a faster registration process but is not mandatory.

09

Insurance Information: Enter the coverage value and the expiration dates in the required insurance fields. Examples of Insurance fields are General Liability Value, General Liability Expiration Date, Professional Liability Value, Professional Liability Expiration Date, etc.



Note: Please see Appendix to view the different SIC Codes and the entities who are exempted from the VAQ Requirement.

MAIN MENU

Register Supplier: Company Details (Contd.)

Below are the key fields that you need to fill in the Your Contact Information section in the Register Supplier: Company Details page of the Supplier Registration form.

10

First Name: Enter the first name of the person registering on behalf of the company.

11

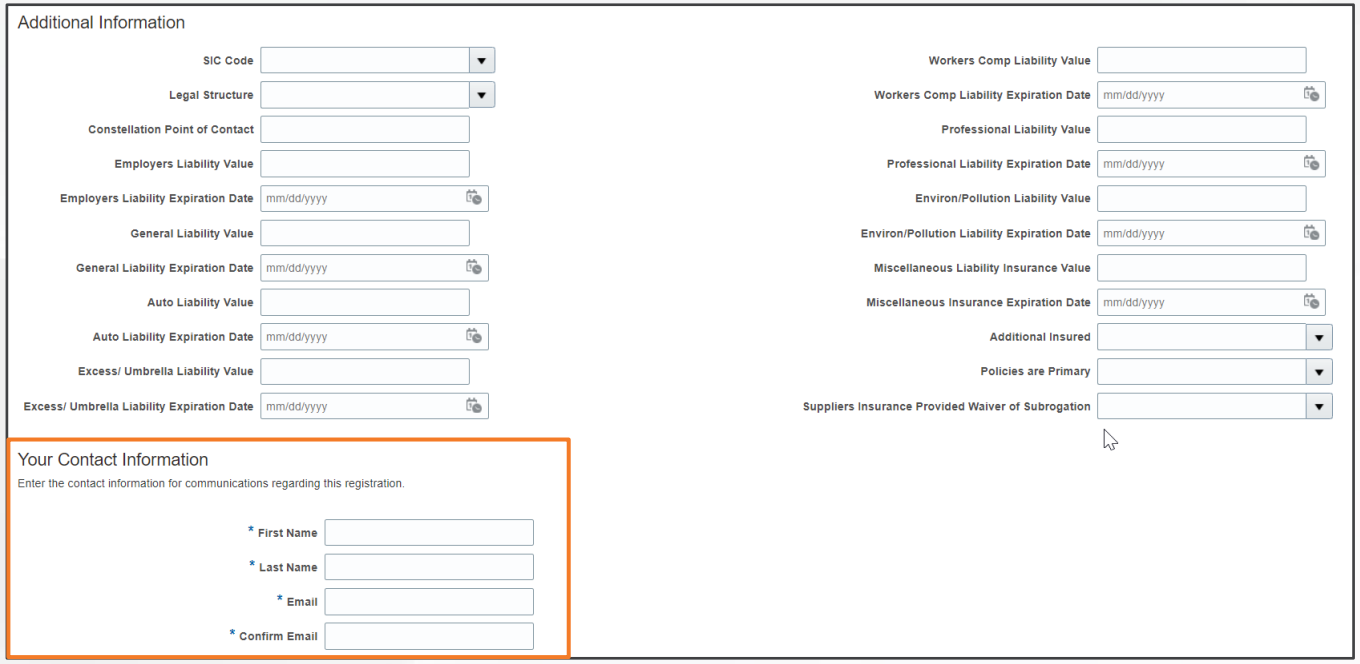
Last Name: Enter the last name of the person registering on behalf of the company.

12

Email: Enter the email address where you want to receive the communications.

13

Confirm Email: Enter the same email that you had entered in the Email field.



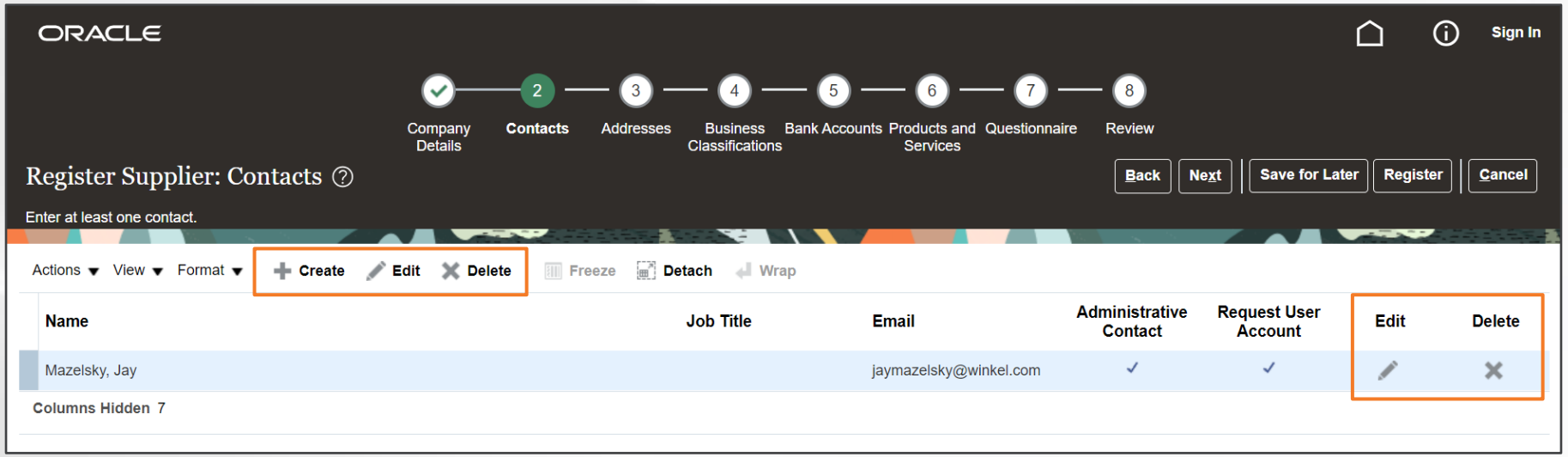
Register Supplier: Contacts

The Register Supplier: Contacts page is displayed when you click the Next button in the Register Supplier: Company Details page. You can create, edit or delete contacts while registering.

Create
You can Create new contacts using the Create button.

Edit
You can Edit the contact details entered in the Company Details screen using the Edit button or icon.

Delete
You can delete the contact details using the Delete button or icon.

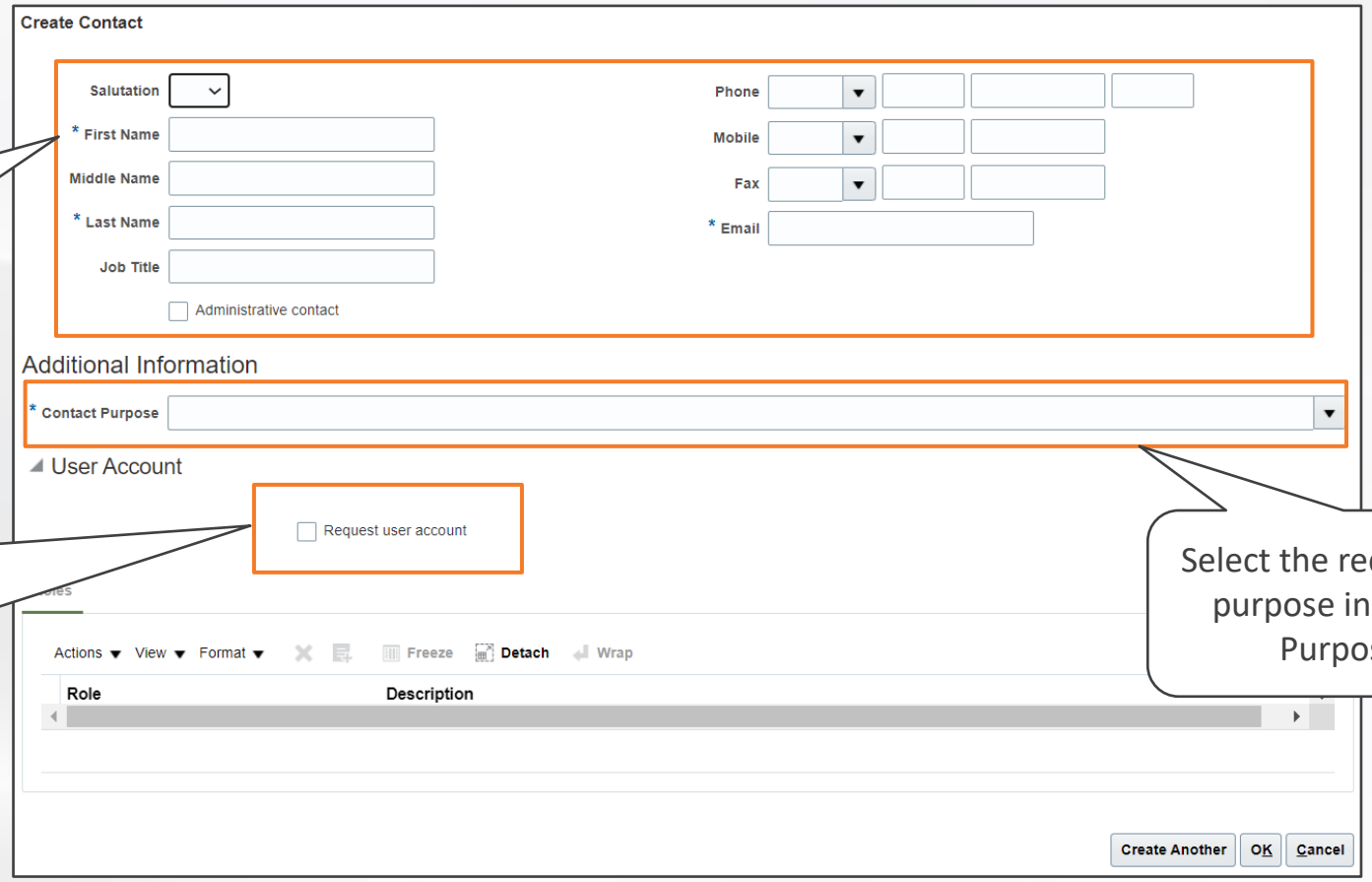


Register Supplier: Contacts (Contd.)

The Create Contact pop-up is displayed when you click the Create button in the Register Supplier: Contacts page.

1

You must enter the contact details in the First Name, Last Name, Job Title, Email, Phone, and Mobile fields.



2

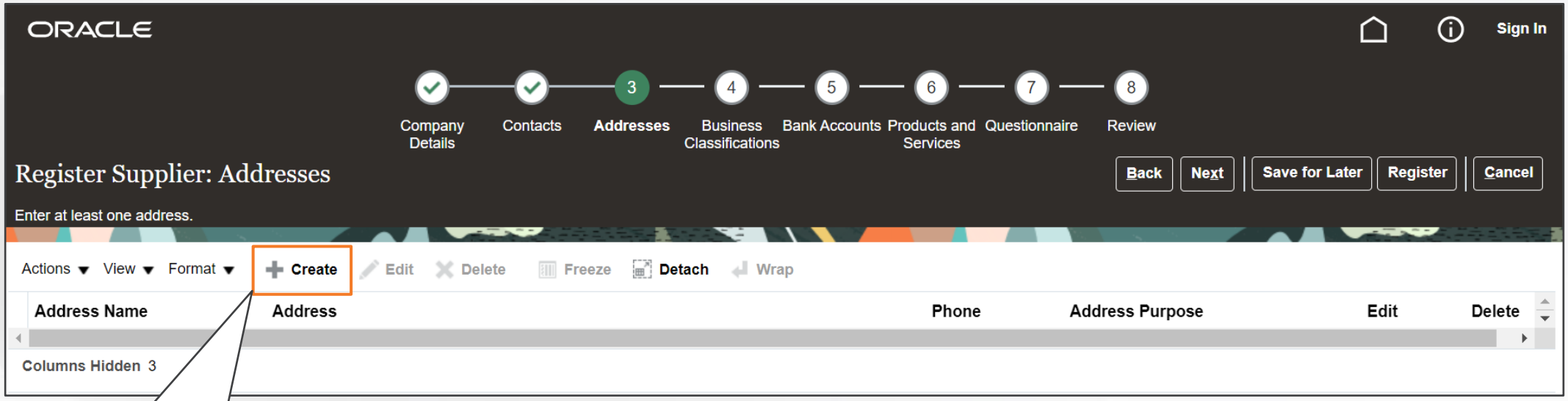
Select the required contact purpose in the Contact Purpose field.

3

Select the Request user account checkbox in the User Account section if the added contact requires access to the supplier portal. This is an optional field.

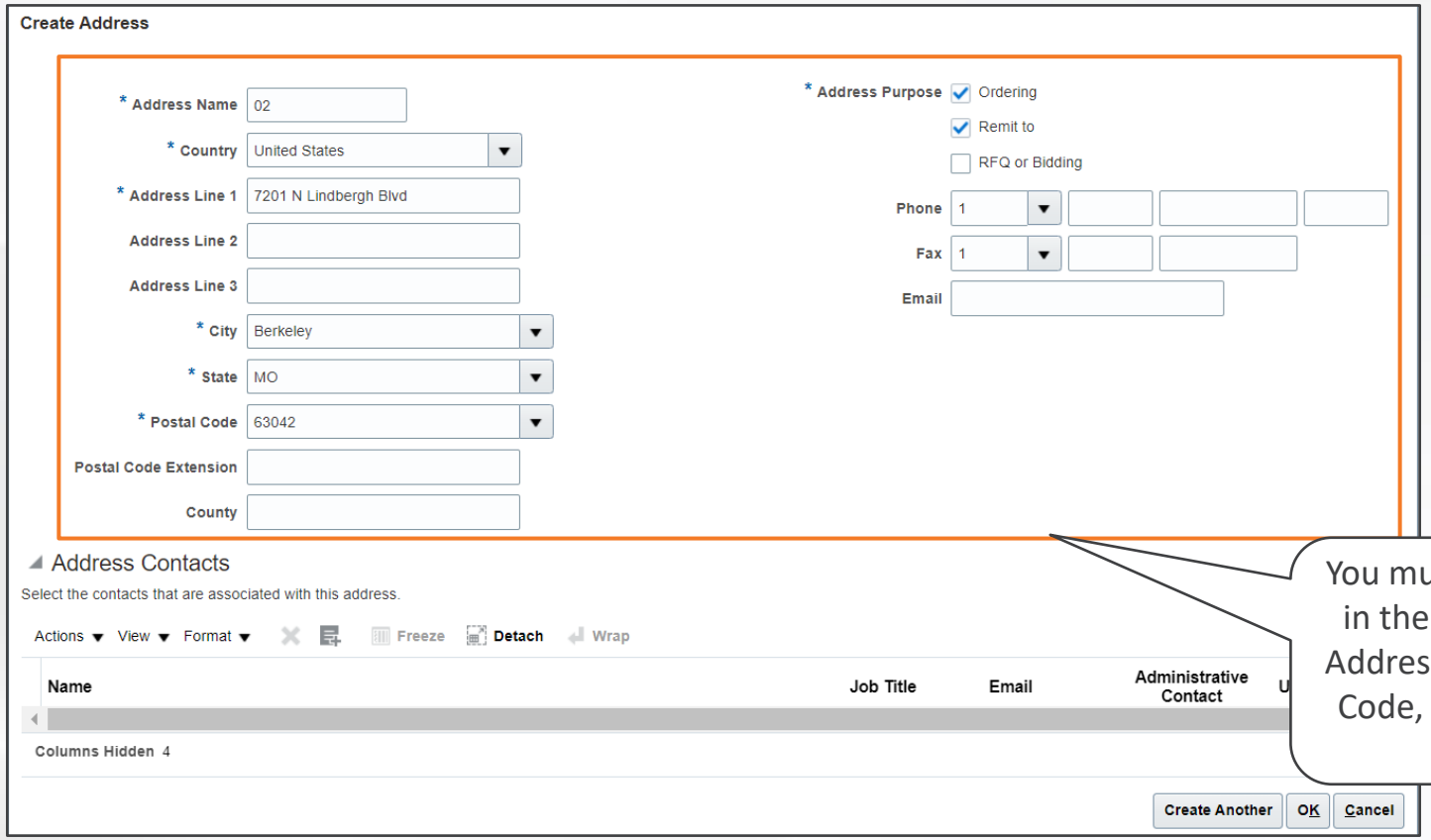
Register Supplier: Addresses

The Register Supplier: Addresses page is displayed when you click the Next button in the Register Supplier: Contacts page. You can add required addresses while registering.



Register Supplier: Addresses (Contd.)

The Create Addresses pop-up is displayed after you click the Create button. You must add the required addresses.

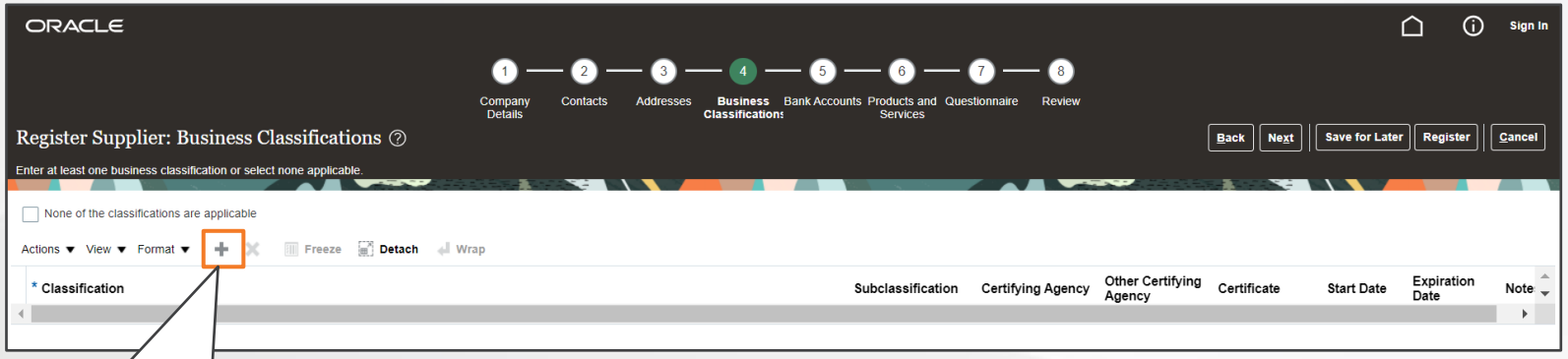


You must add the address details in the Address Name, Country, Address Line 1, City, State, Postal Code, and the Address Purpose fields.

Note: Enter the Postal Code first to auto-populate the City and State fields.

Register Supplier: Business Classifications

Register Supplier: Business Classifications page is displayed when you click the Next button in the Register Supplier: Addresses page. Business Classifications help in identifying diversity classes.

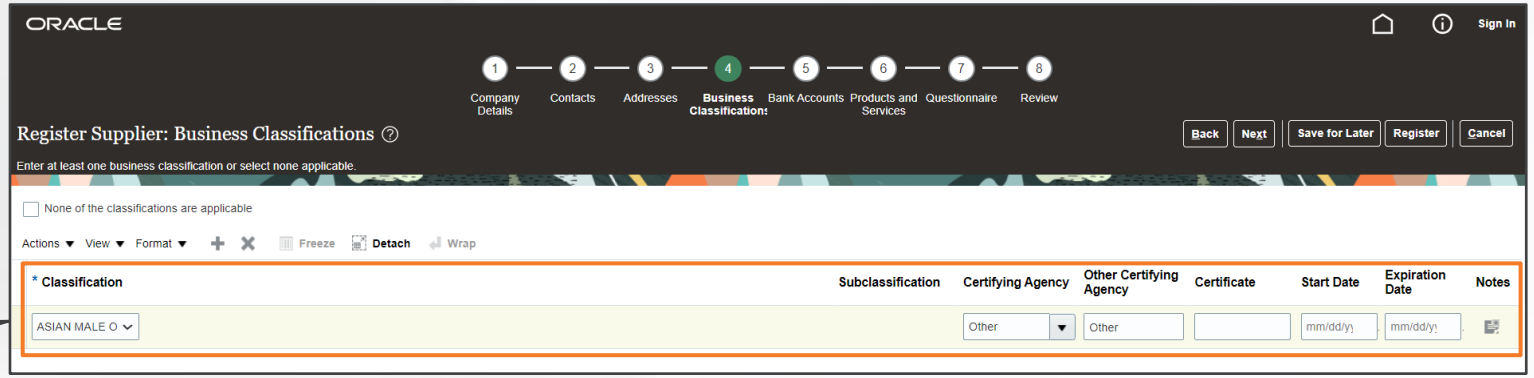


Click the + icon to add Business Classification details.

1

2

You can add details in the Classification, Certifying Agency, Certificate, Start Date, and End Date fields.

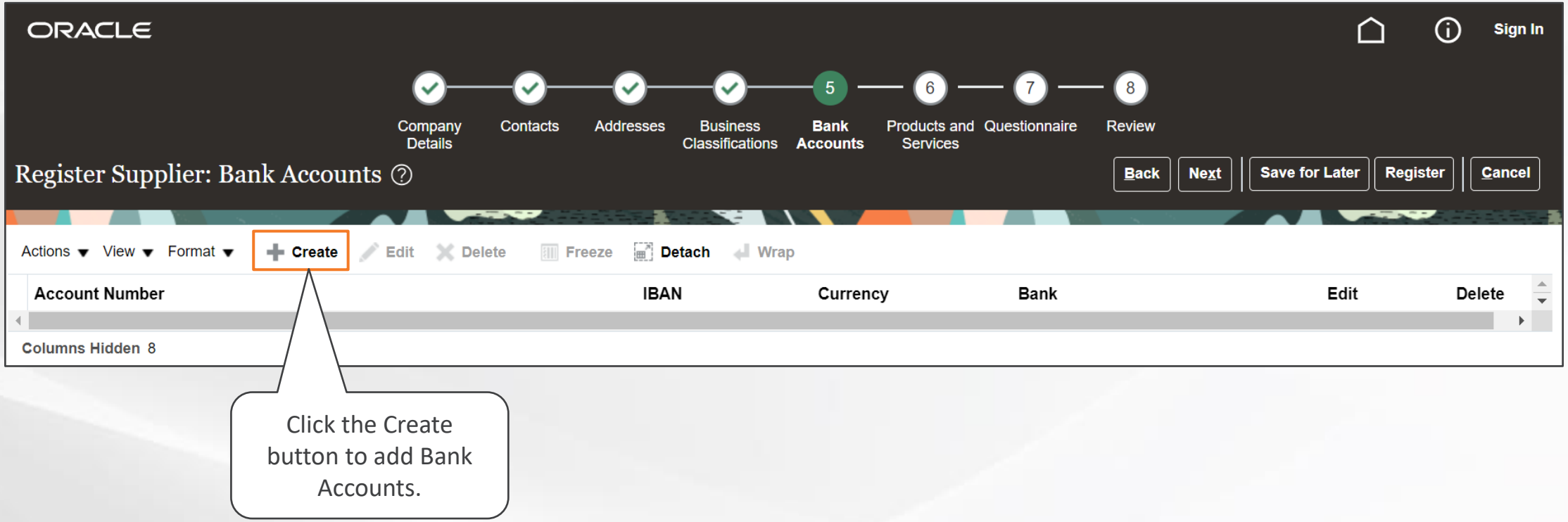


Note: You can select the None of the classifications are applicable checkbox if there are no business classifications to be added.

MAIN MENU

Register Supplier: Bank Accounts

Register Supplier: Bank Accounts page is displayed when you click the Next button in the Register Supplier: Business Classifications page. You can add bank account details while registering.

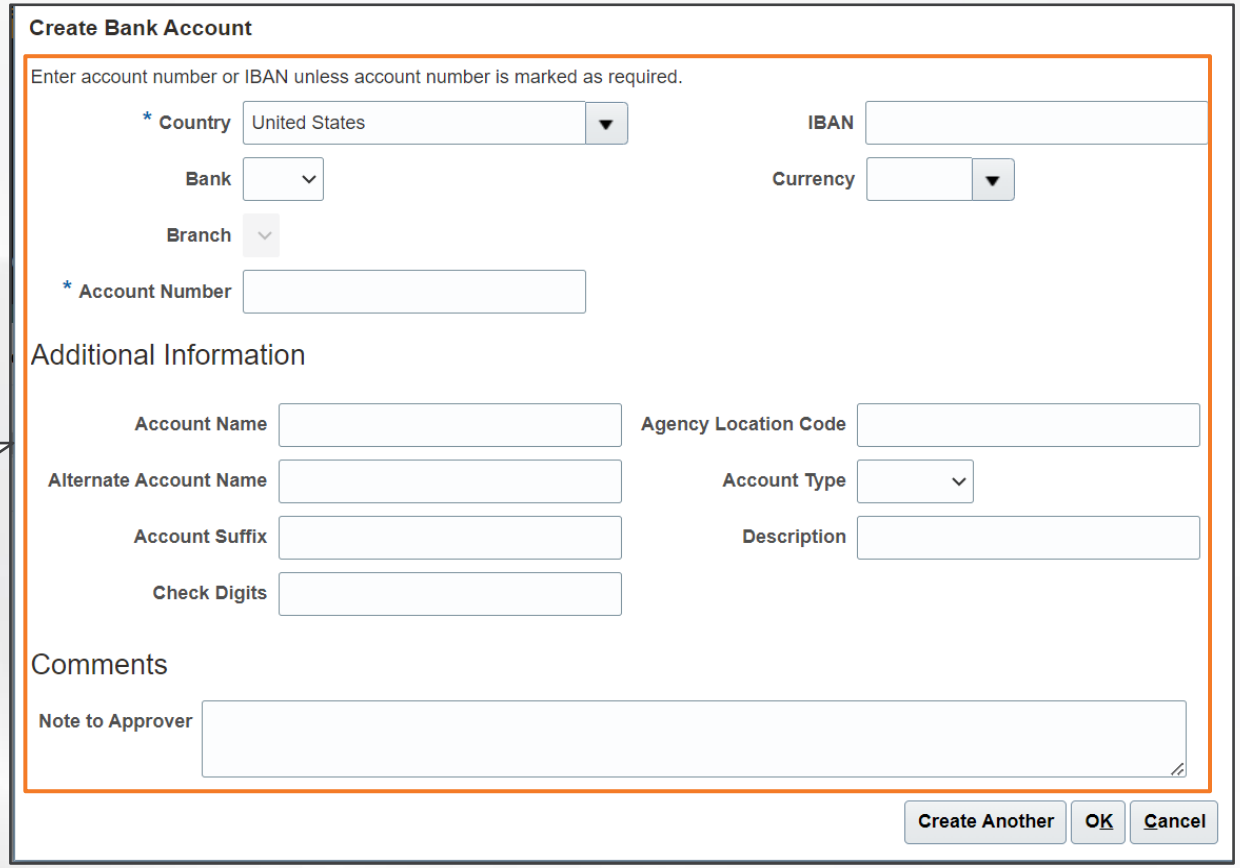


Note: You do not need to add bank accounts in case you receive payment via Check and Virtual Credit Card (VCC) payments. You must mandatorily add bank accounts for all the other payment methods.

Register Supplier: Bank Accounts (Contd.)

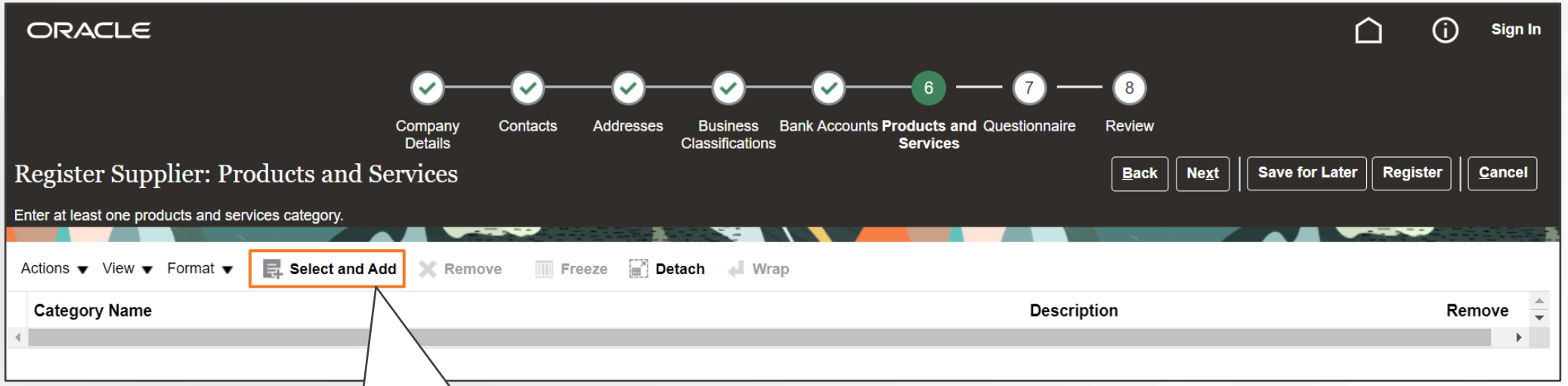
The Create Bank Account pop-up is displayed after you click the Create button.

You can add your bank account details in the Create Bank Account pop-up that appears.



Register Supplier: Products and Services

Register Supplier: Products and Services page is displayed when you click the Next button in the Register Supplier: Bank Accounts page.

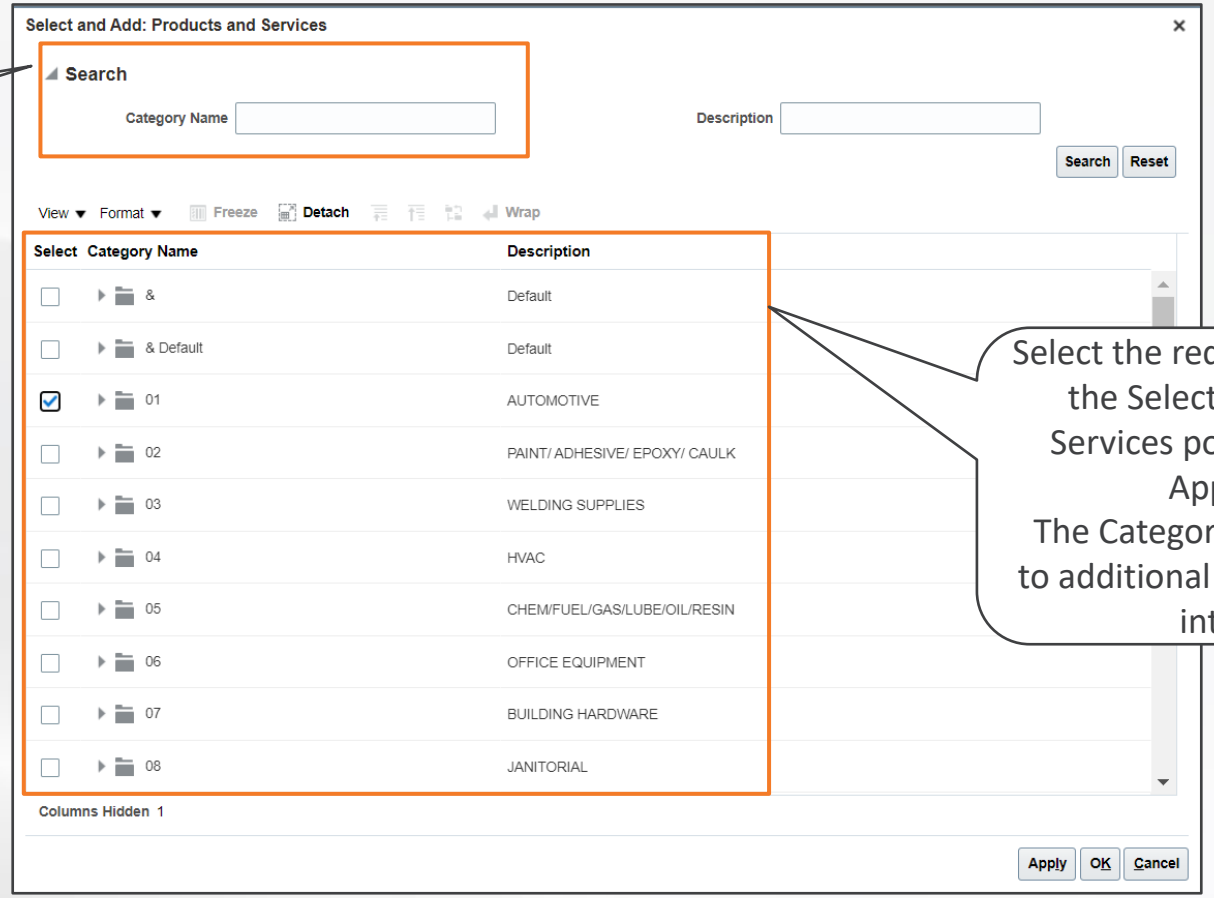


Click the Select and Add button to select and add the required Products and Services Category.

Register Supplier: Products and Services (Contd.)

The Select and Add: Products and Services pop-up is displayed after you click the Select and Add icon. You can add the products and services category name while registering.

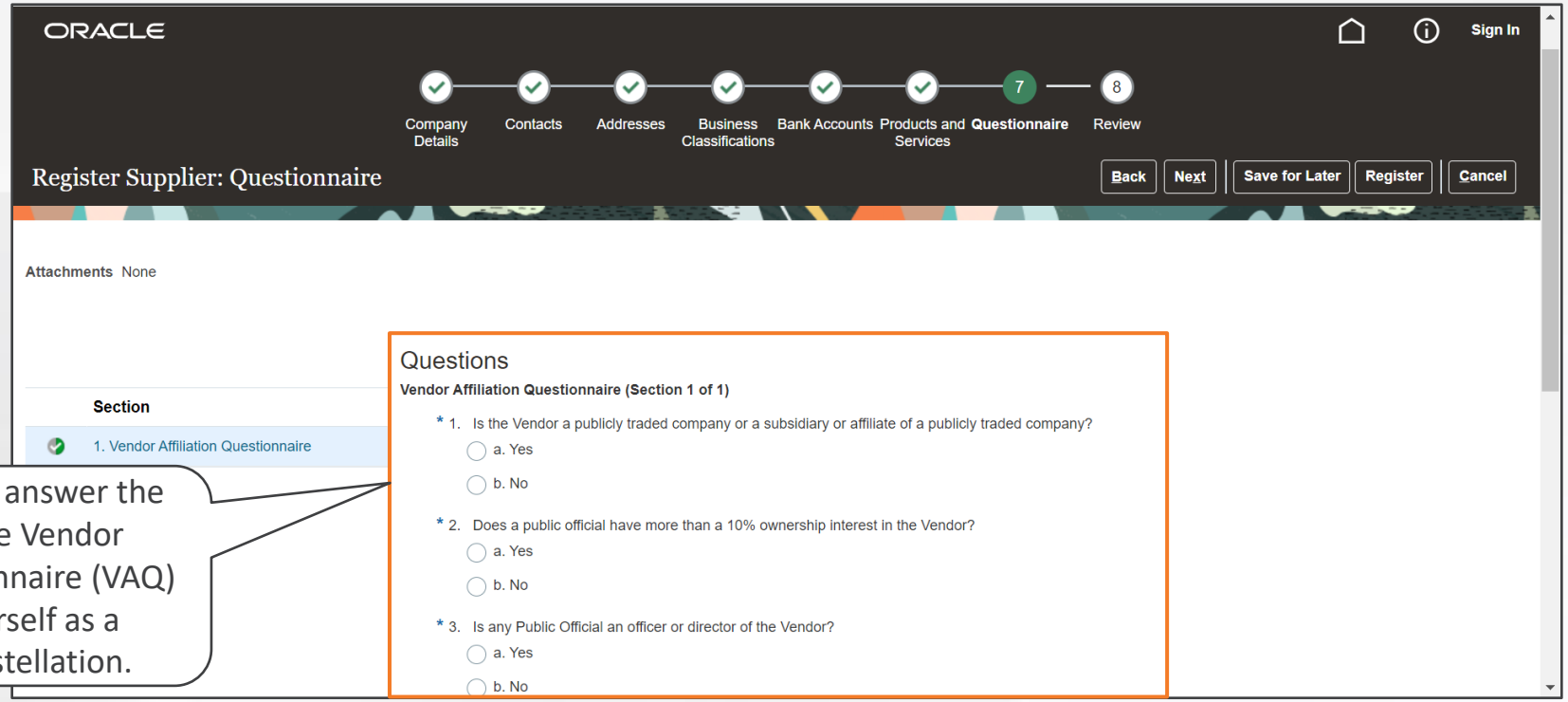
2 You can alternatively search for the required Category Name in the Search section.



1 Select the required Category Name from the Select and Add: Products and Services pop-up that appears. Click Apply then click OK.
The Category Names can be expanded to additional sub-categories that roll-up into the main one.

Register Supplier: Questionnaire

Register Supplier: Questionnaire page is displayed when you click the Next button in the Register Supplier: Products and Services page.

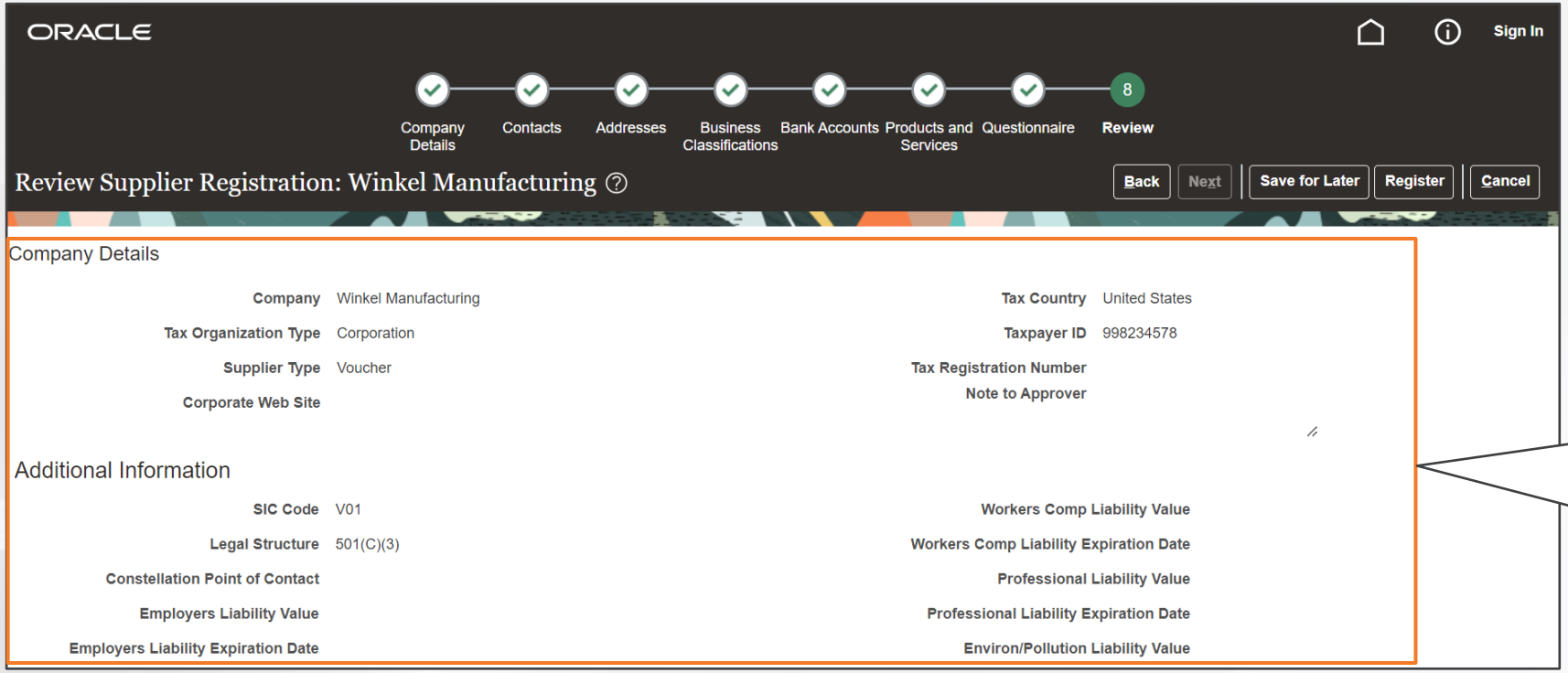


It is mandatory to answer the questions in the Vendor Affiliation Questionnaire (VAQ) to register yourself as a Supplier in Constellation.

Note: If you have selected the Supplier Type as Voucher Exempt, this questionnaire will not be presented to you.

Register Supplier: Review

Review Supplier Registration page is displayed when you click the Next button in the Register Supplier: Questionnaire page.

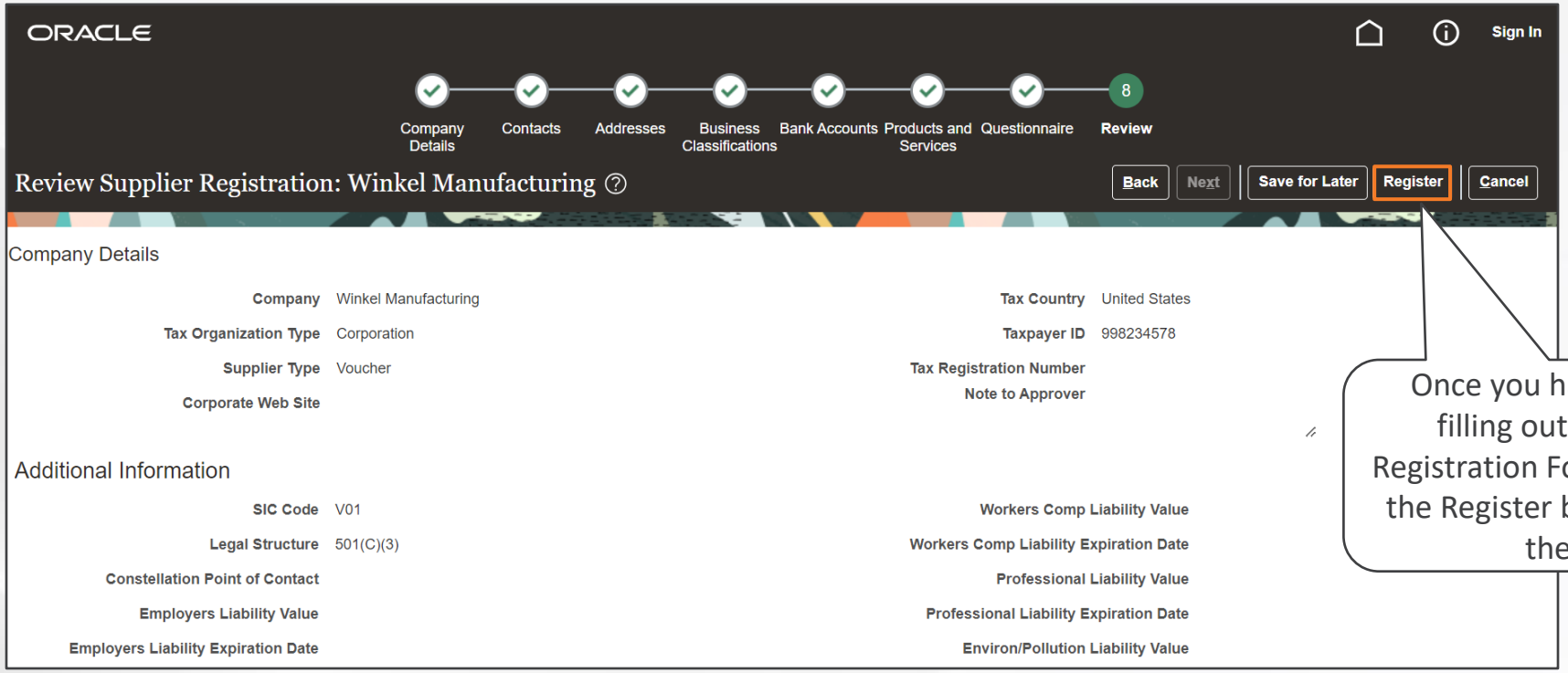


You can review the details that you have filled in the Supplier Registration form in the Review Supplier Registration page and make changes to it, if required.

Note: The detailed steps for filling out the Supplier Registration Form will be covered in the Filling Out Registration Forms job aid.

Request for Approval

Once you have filled in all your details in the Supplier Registration form, you can submit the form to request for approval.



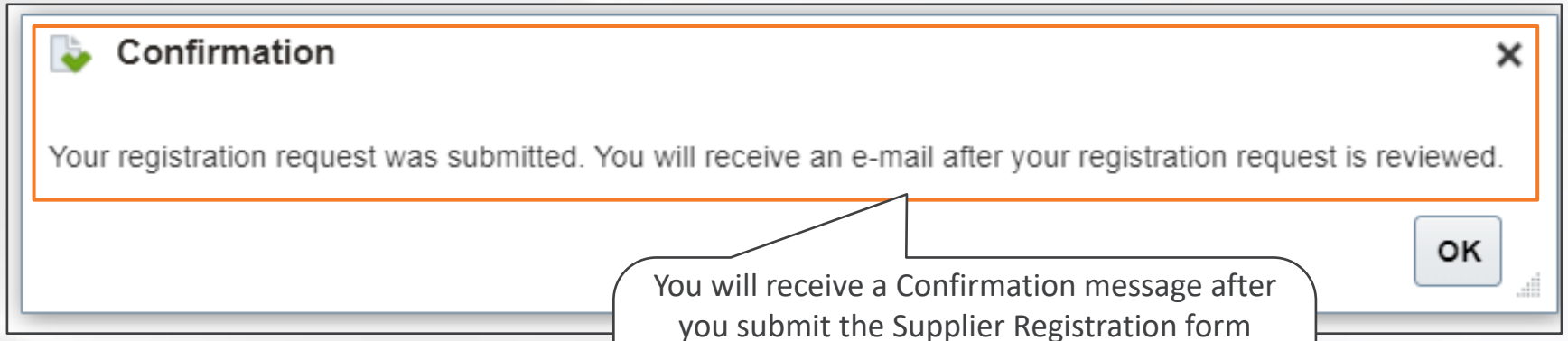
Request for Approval (Contd.)

The Confirmation pop-up is displayed.

You will receive the following emails once you submit the Supplier Registration Form:

- Supplier Registration Request was Approved
- Supplier Contact User Account for Constellation was Created
- Welcome to cfsclouderp
- You are now a Registered Supplier with Constellation Energy

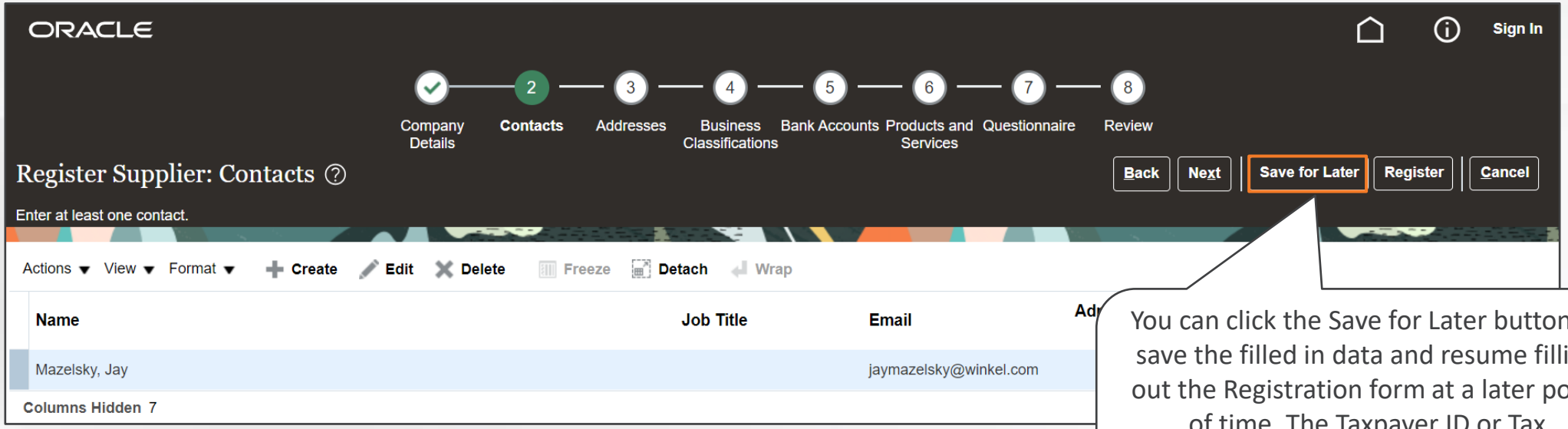
.



You will receive a Confirmation message after you submit the Supplier Registration form mentioning that the registration request was submitted. You will also receive an email in the registered email address after your registration request is reviewed.

Save For Later Email Notification

Save for Later button in the Registration form allows you to save the details that you have already filled in the form and helps you fill the rest of the form at a later point of time.



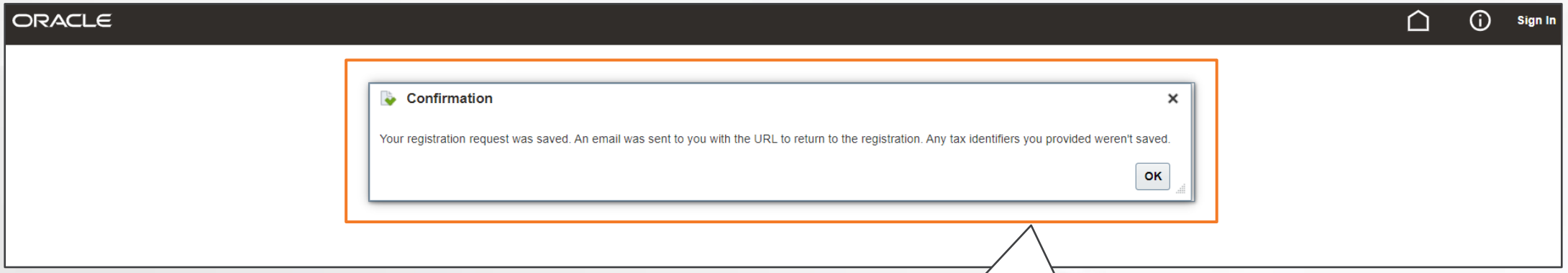
1

You can click the Save for Later button to save the filled in data and resume filling out the Registration form at a later point of time. The Taxpayer ID or Tax Registration Number is not saved for security reasons.

Note: The Save for Later button can be clicked at any point of time while filling up the Supplier Registration form.

Save For Later Email Notification (Contd.)

Save for Later button in the Registration form allows you to save the details that you have already filled in the form and helps you fill the rest of the form at a later point of time.

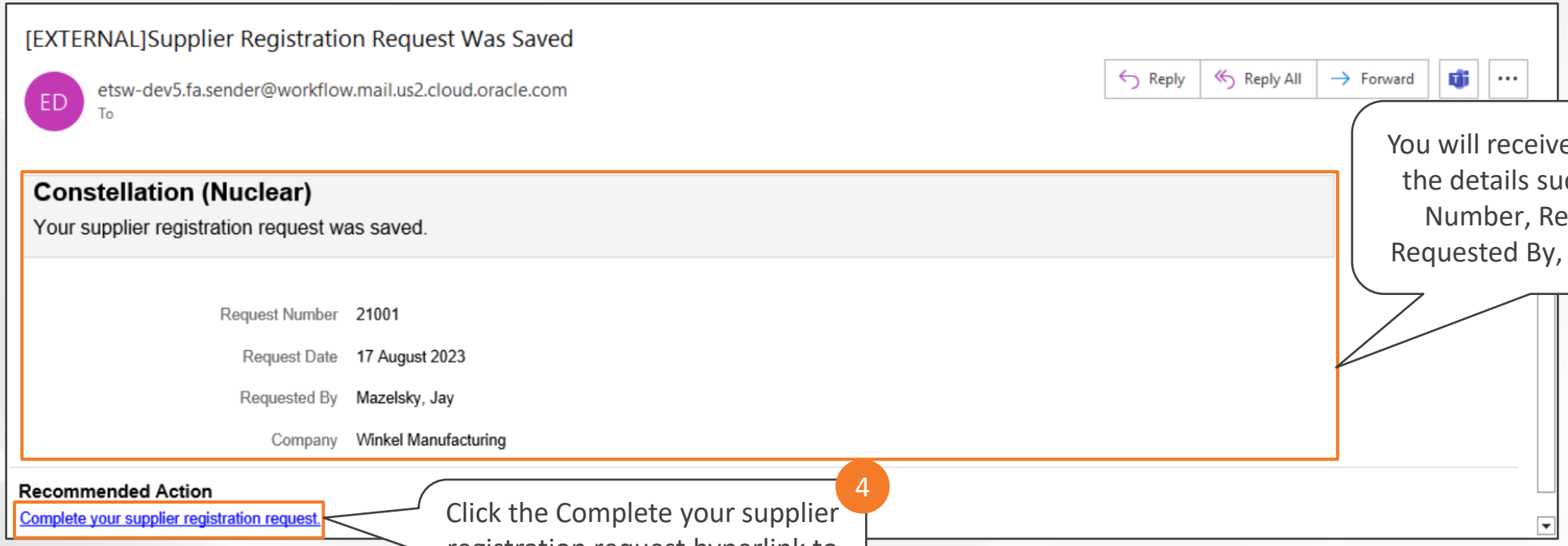


2

You will receive a Confirmation dialog-box after you click the Save for Later button mentioning that the registration request was saved, and an email will be received by the email address entered in the Contacts page.

Save For Later Email Notification (Contd.)

You will receive a "Supplier Registration Request was Saved" email stating all the necessary details along with the Supplier Registration form hyperlink to resume working on the form at a later point in time.



Provide More Information As Requested by Approver

APOLLO

Constellation can request for more information if they consider that more information is required or the provided information is incorrect.

Review submitted Registration form

The submitted Supplier Registration form will be reviewed by Constellation.

Supplier receives email with links

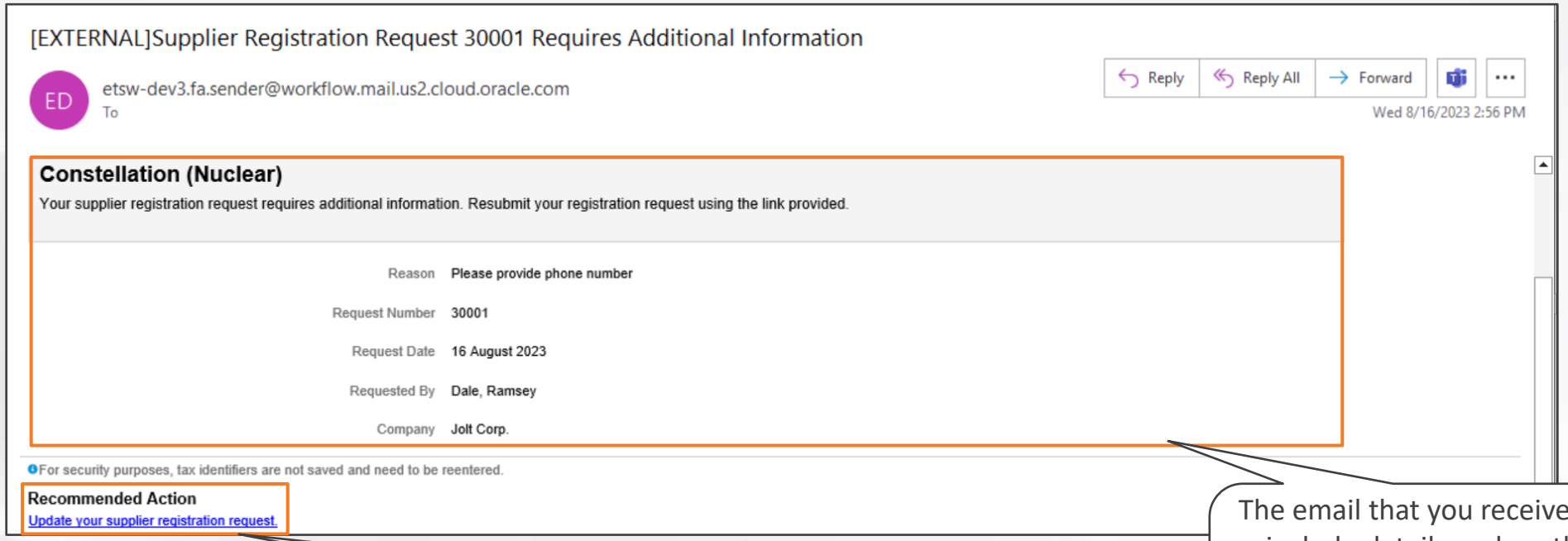
Constellation requests for more information and the supplier receives an email stating the reason along with the Supplier Registration form link.

Supplier provides more information

Supplier fills in the required information and submits it again for approval.

Provide More Information As Requested by Approver (Contd.)

Once Constellation requests for more information, you will receive an email with the reason and the Supplier Registration form link.



1

The email that you receive will include details such as the Reason, Request Number, Request Date, Requested By and Company details.

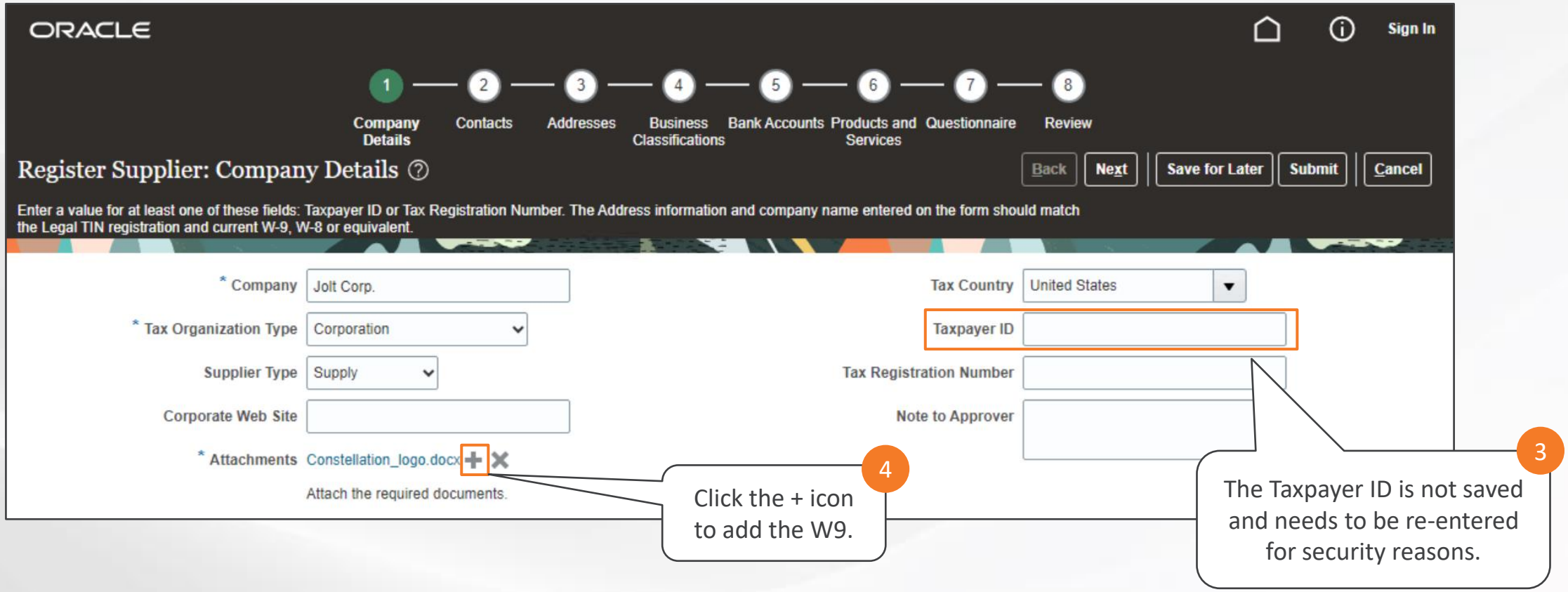
2

Click the Update your supplier registration request hyperlink to update the registration form.

MAIN MENU

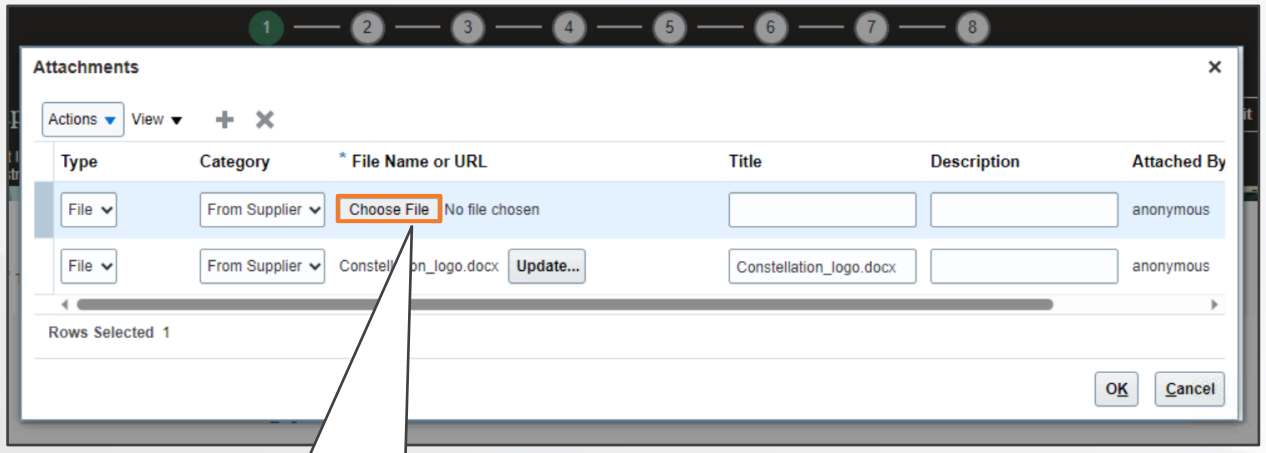
Provide More Information As Requested by Approver (Contd.)

When you click the Update your supplier registration request hyperlink in the email, the Supplier Registration form is displayed.



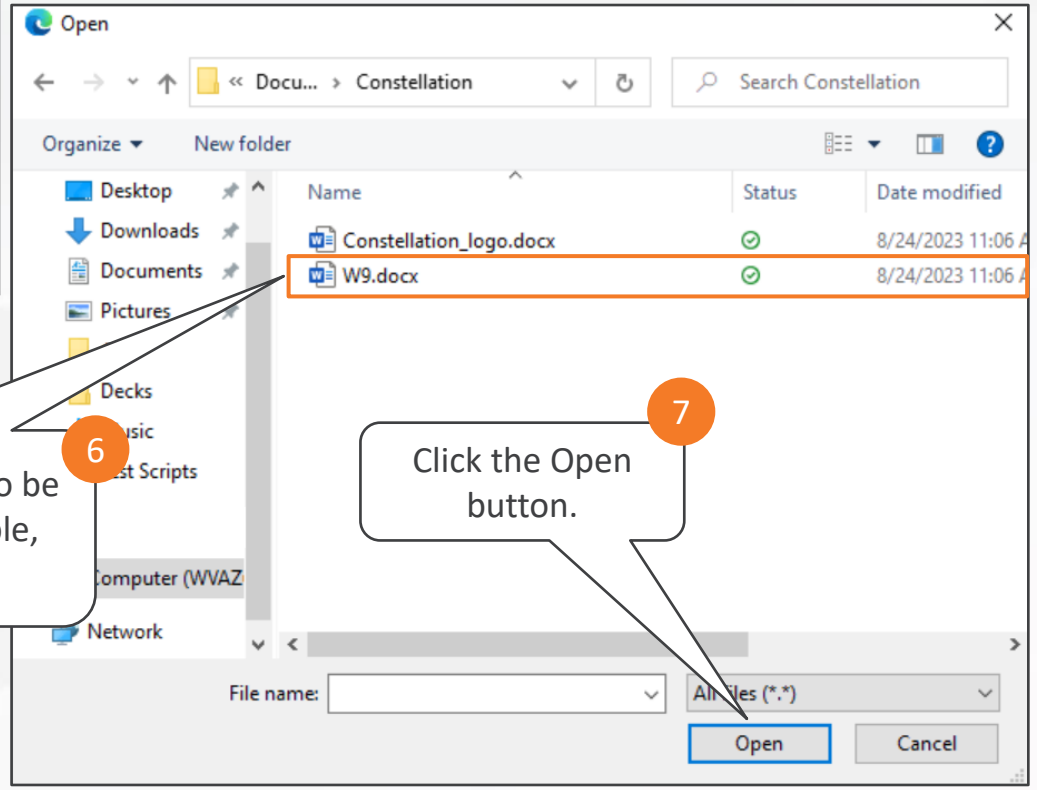
Provide More Information As Requested by Approver (Contd.)

The Attachments pop-up is displayed.



5

Click the Choose File button to choose the required file from your local desktop.



6

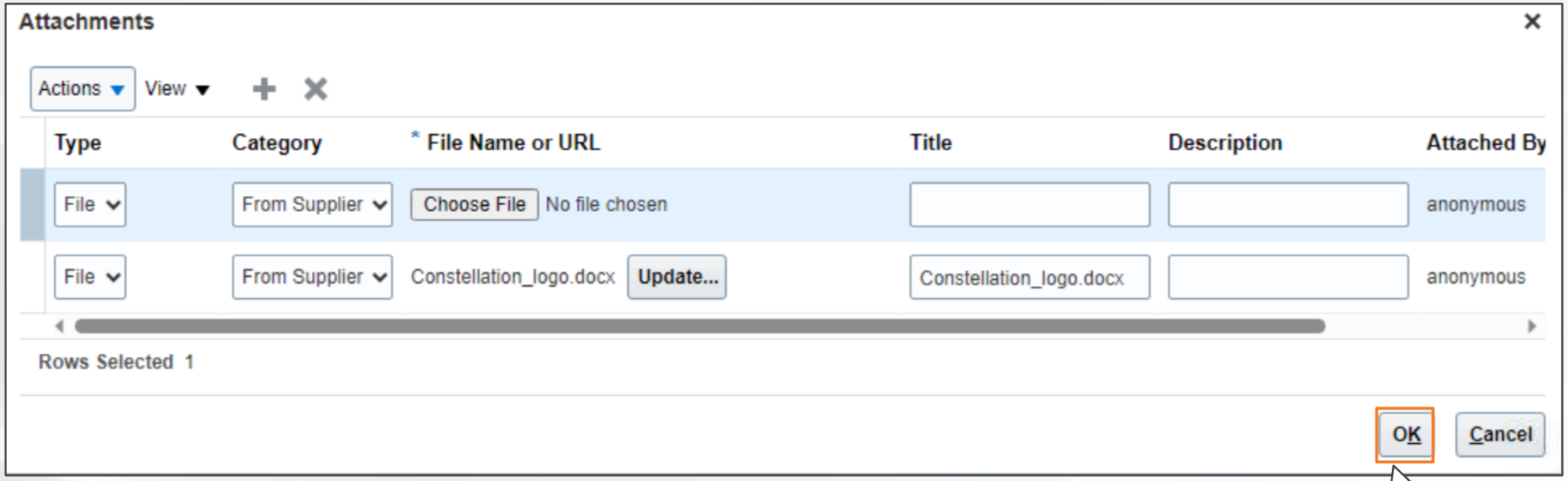
Select the required file to be attached. In this example, W9 is selected.

7

Click the Open button.

Provide More Information As Requested by Approver (Contd.)

The W9 form is attached.

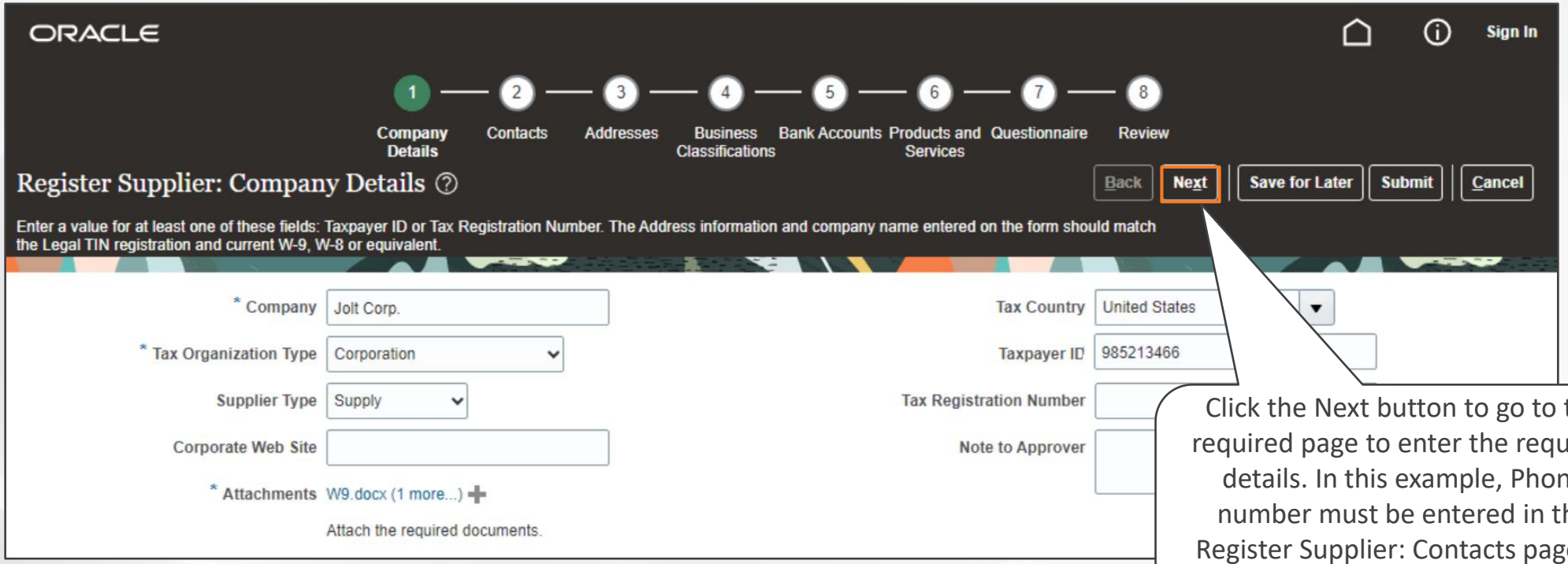


8

Click the OK button to confirm the selection.

Provide More Information As Requested by Approver (Contd.)

The Attachments and the Taxpayer ID has been updated.



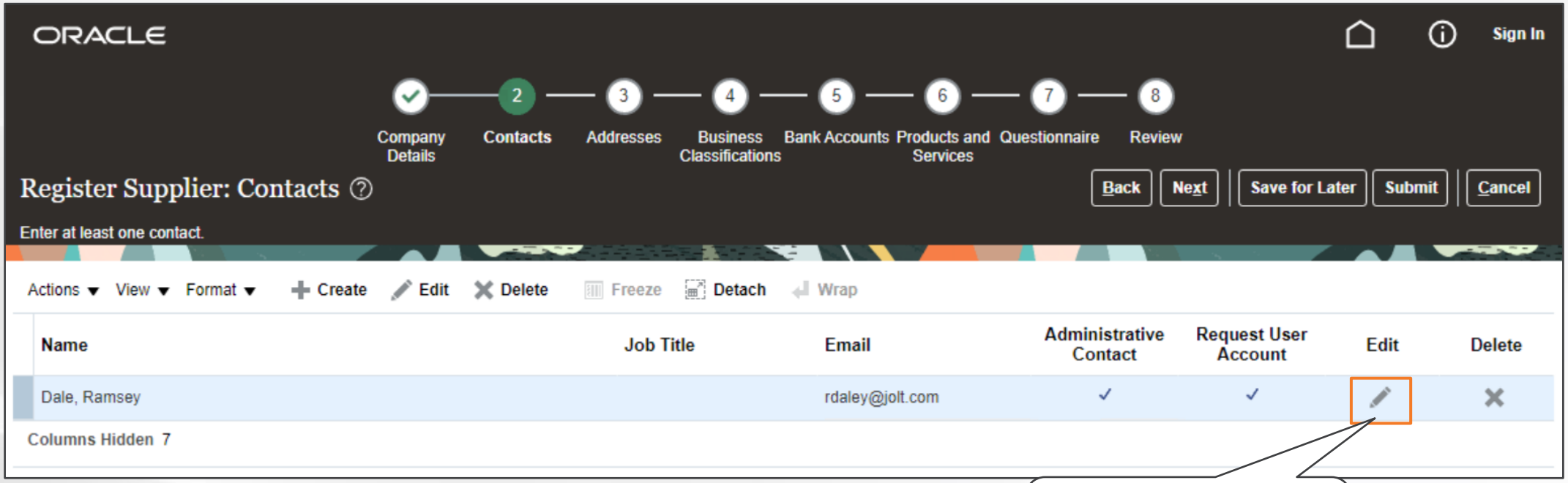
Click the Next button to go to the required page to enter the required details. In this example, Phone number must be entered in the Register Supplier: Contacts page as per the received email.

9

Note: You can click the page numbers on top to go to the required page of the Supplier Registration form to enter the required details.

Provide More Information As Requested by Approver (Contd.)

The Register Supplier: Contacts page is displayed when you click the Next button in the Register Supplier: Company Details page.

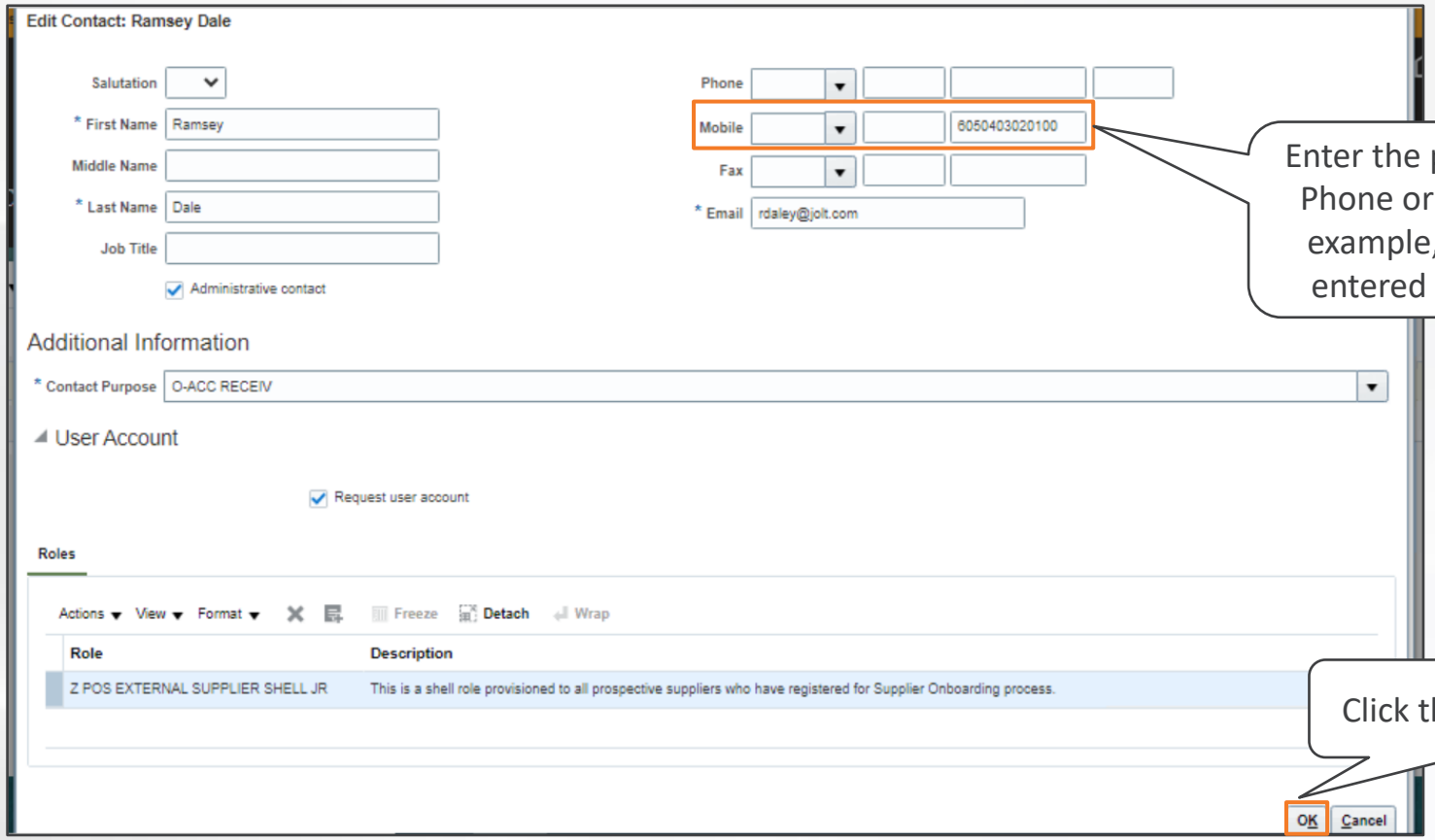


Click the Edit icon to edit the contact details.

10

Provide More Information As Requested by Approver (Contd.)

The Edit Contact: Ramsey Dale pop-up is displayed after you click the Edit button.



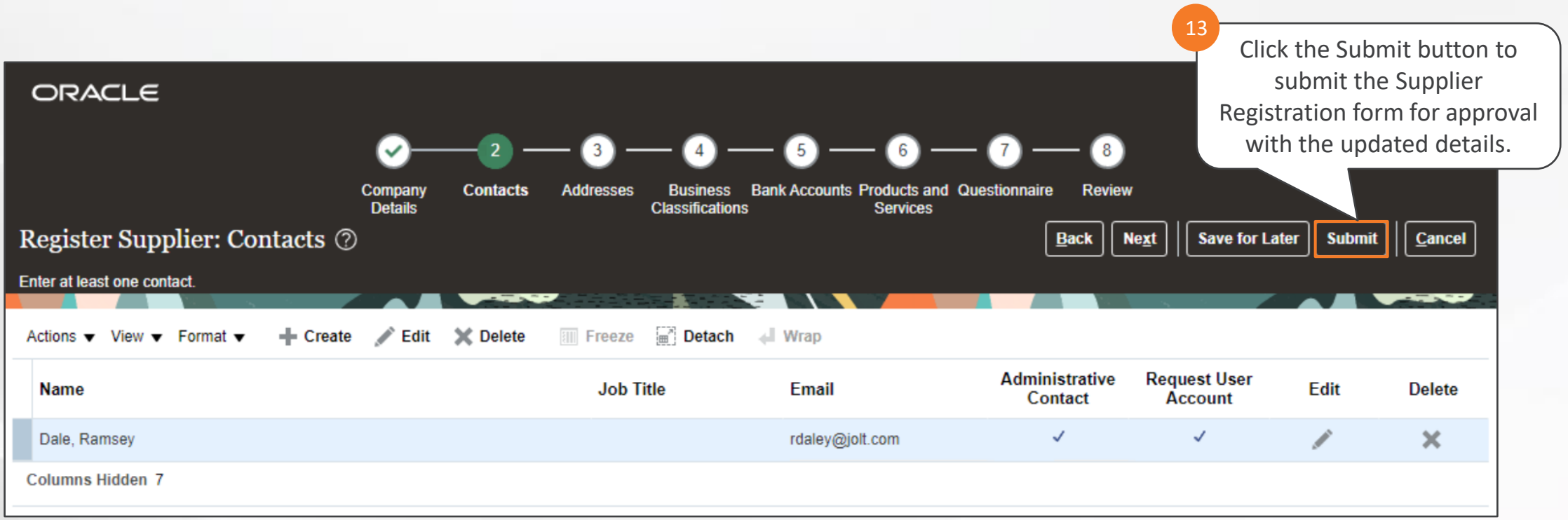
11 Enter the phone number in the Phone or Mobile field. In this example, 6050403020100 is entered in the Mobile field.

12 Click the OK button.

Provide More Information As Requested by Approver (Contd.)

APOLLO

At this stage, you can also edit other details of the Supplier Registration form, if required.



Module Summary

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

- Provide an overview of supplier registration process
- Fill out the registration form
- Submit the Registration Request
- Review Save For Later email notification
- Submit additional information without creating a new request

Module:

1 — 2

Access to Supplier Portal

Module Objectives

After completing this module, you will be able to:

- Discuss the process of receiving supplier portal access

Receiving Supplier Portal Access

APOLLO

You can log in to the Oracle dashboard once you are registered as a supplier.

Click each icon to learn more about receiving Supplier Portal access.

IDCS Email received with credentials

Identity Cloud Service (IDCS) Login

Multi Factor Authentication (MFA) Setup

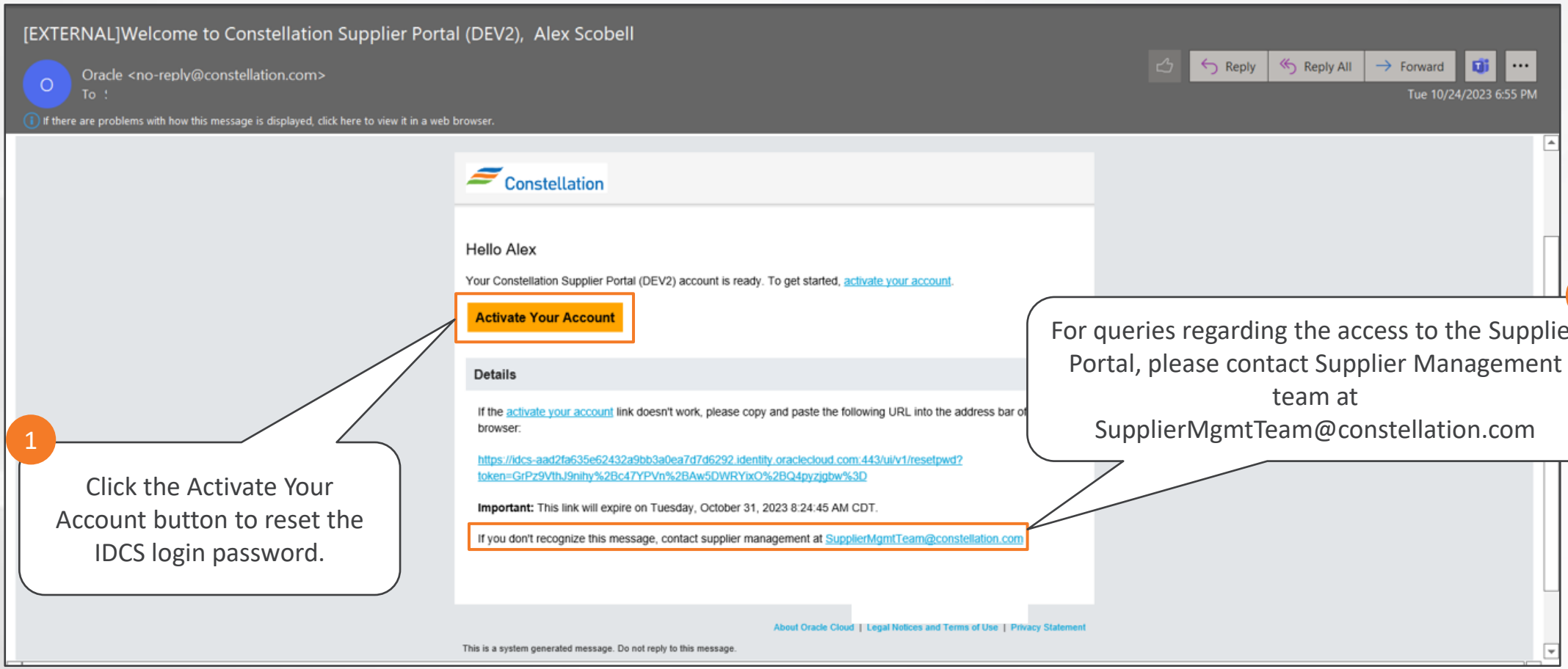
Supplier Portal Access

MAIN MENU

Constellation

IDCS Email Received with Credentials

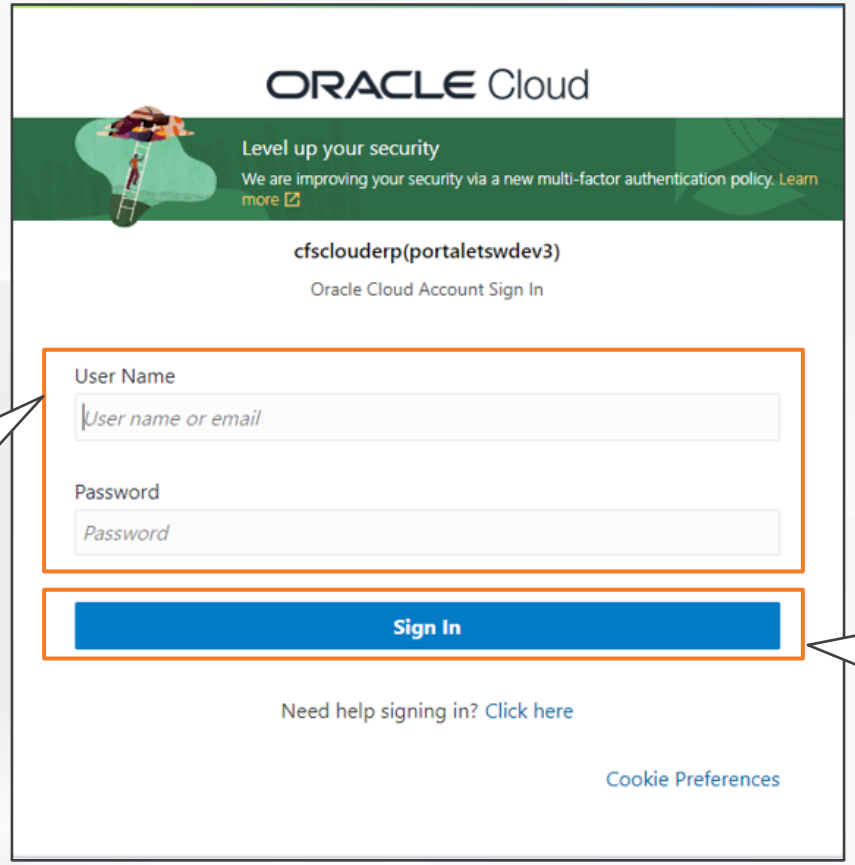
Once you are registered, you will receive an IDCS email with credentials to log in to the Oracle Dashboard.



IDCS Login

Once you reset your password and activate your account, you can log in to IDCS using your credentials.

1 Enter the User Name (your registered email ID would be the default User Name), and the Password that you set while activating the account.

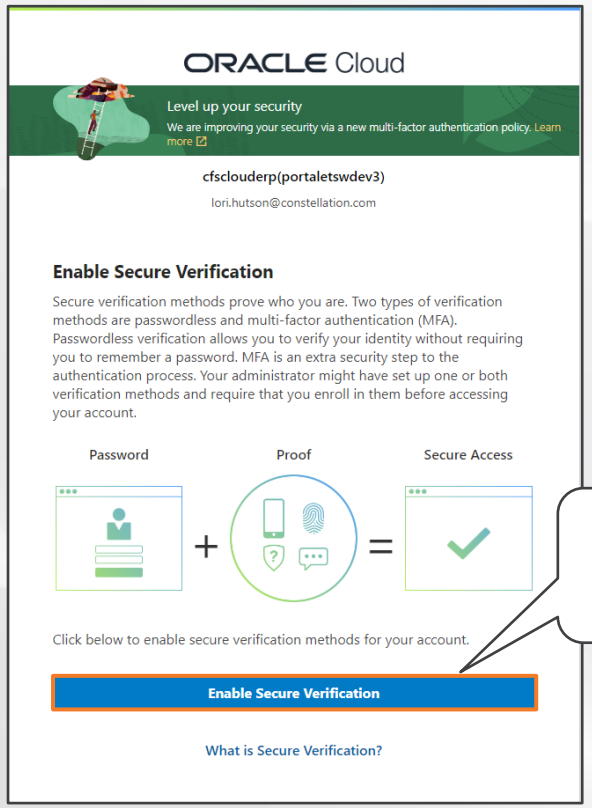


2 Click the Sign In button to log in to IDCS.

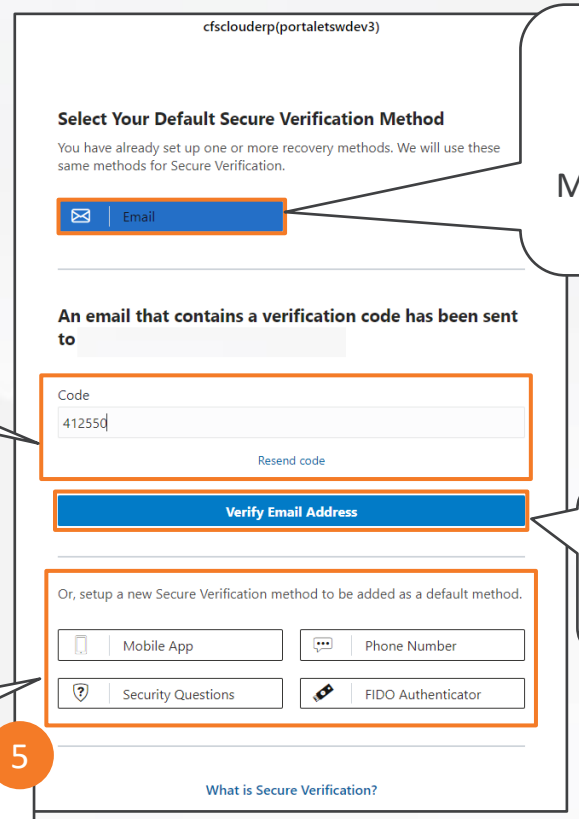
MAIN MENU

MFA Setup

As you sign in, you will have to set up your MFA to enable another layer of security for accessing Oracle dashboard.



1 Click the Enable Secure Verification button to setup the MFA.



2 The default secure verification method shows up in the Select Your Default Secure Verification Method section. In this example, it is set up to Email.

3 Enter the verification code sent to your email.

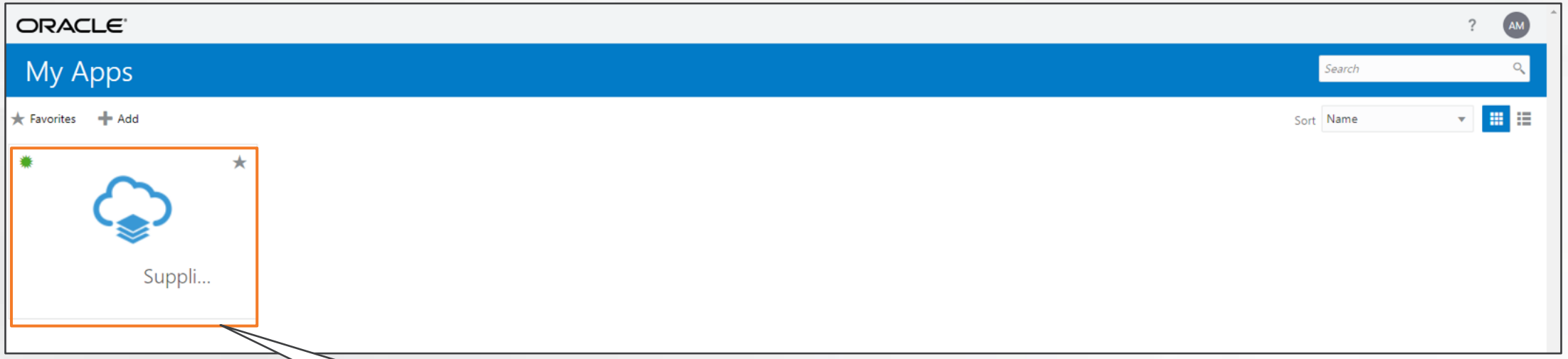
4 Click the Verify Email Address button after entering the verification code.

5 Alternatively, you can select a new secure verification method from the available options to add it as a default method.

MAIN MENU

Supplier Portal Access

After completion of MFA Setup, you will be directed to My Apps screen.



Click the Supplier Portal tile to log in to Oracle dashboard.

1

Note: The name of the tile is for illustrative purposes and will reflect appropriately after Go-Live.

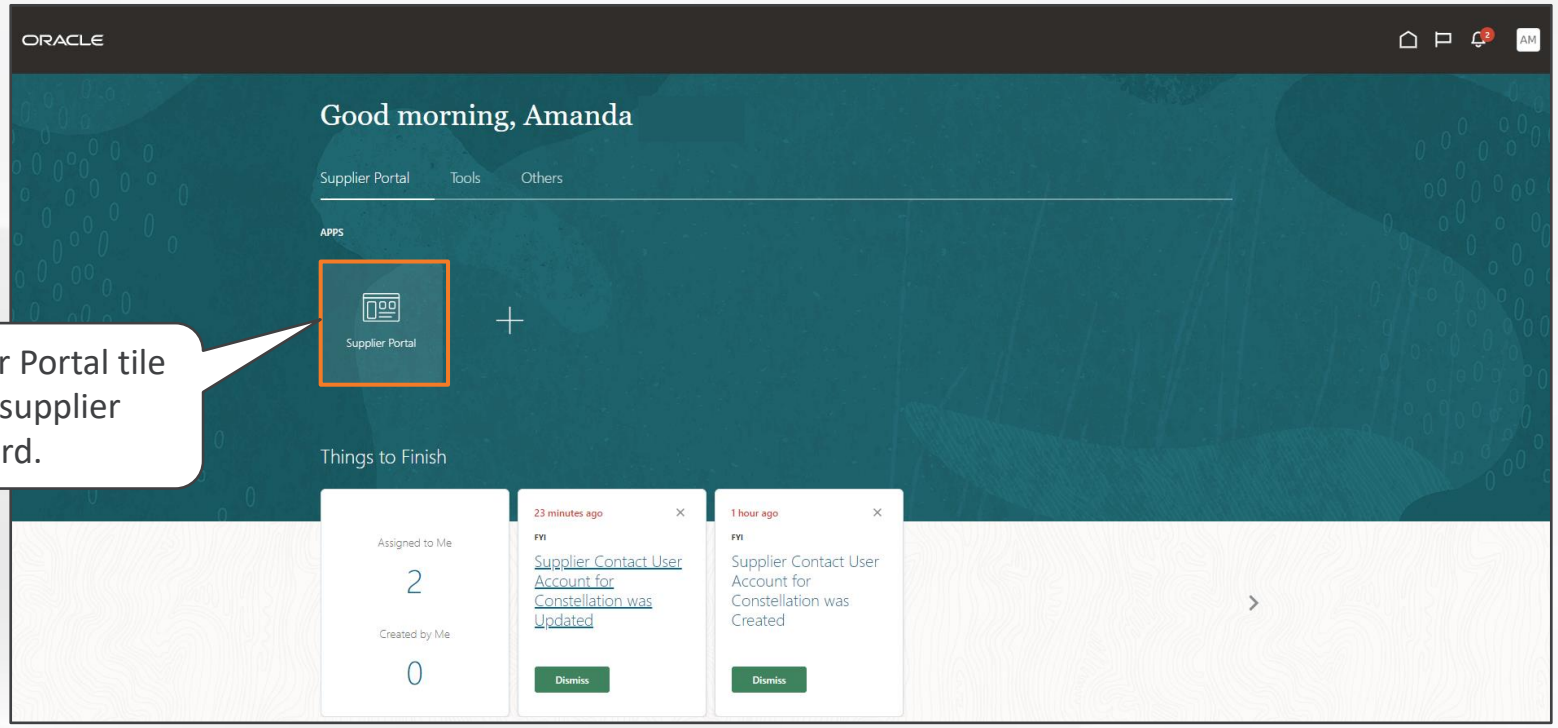
Supplier Portal Access (Contd.)

Now, you will be able to view the Oracle Homepage.

Note: At this stage, you will not be able to view and access the Supplier Portal.

Supplier Portal Access (Contd.)

Once you have been promoted to transact with Constellation, you will be able to access the Supplier Portal in the Oracle dashboard.



Note:

1. Once you have been promoted to transact with Constellation, you will receive an email and a bell notification mentioning the same.
2. Once you are provided the supplier portal access, you can add more contacts and provide them access to the supplier portal. The detailed steps for adding contacts is covered in the SUP13_SP02_Supplier Portal – Updating Your Company Profile Job Aid.

Module Summary

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

- Discuss the process of receiving supplier portal access

Constellation

Key Takeaways

Now that you have completed the Supplier Onboarding and Registration (for Suppliers) course, here are some key takeaways:

01 Supplier Registration process begins with filling up the Supplier Registration Form and submitting it for approval.

02 VAQ Compliance Questionnaire will not be presented to you if you have selected the Supplier Type as Voucher Exempt.

03 Save for Later email notification enables the suppliers to resume filling up of Supplier Registration form at a later point of time.

04 Suppliers submit the Supplier Registration form and request for approval to register themselves in Constellation.

05 Constellation may request for more information if they consider that more information is required or the provided information is incorrect for registration.

06 Suppliers will get access to Supplier Portal once they are promoted to transact with Constellation.

Supplemental Job Aids

The Job Aid related to this course is listed below.

Sl. No.	Job Aid
1	Filling Out Registration Forms

THANK YOU

Congratulations! You have completed the Supplier Onboarding and Registration (for Suppliers) course!

Suppliers Exempted from the VAQ Requirement

APOLLO

The following types of entities are exempted from completing the VAQ:

Sl. No.	Description
1.	Bank Fees related to Mergers, Acquisitions and Divestitures
2.	Bank Fees, Interest and Dividends
3.	Bank Payments in support of Corporate Credit Card Program
4.	Board of Directors Fees and Trustee Expenses/Fees
5.	Bulk Postage Accounts
6.	Co-Owner Reimbursements
7.	Corporate Claims
8.	Corporate Membership Dues
9.	Corporate Refunds
10.	Direct Payments to Media Companies
11.	Donations (Documentation of Corporate Relations Approval)

Sl. No.	Description
12.	Employee Benefits
13.	Entertainment Companies such as Zoos, Museums, etc.
14.	Exelon Companies
15.	Federal, State, City and Local Taxes
16.	Foreign Companies
17.	Human Resource Reimbursements
18.	Insurance Related Fees
19.	Intercompany
20.	Landowners
21.	Nuclear Fuels
22.	Payment to Local Publication for Ads or Legal Notices

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Suppliers Exempted from the VAQ Requirement (Contd.)

APOLLO

The following types of entities are exempted from completing the VAQ:

Sl. No.	Description
23.	Safety Land Bonds, Trucks and Trailer Stickers
24.	Storm Event Payments for Mutual Assistance
25.	Supplier Credits (Only for Accounts Payable Use)
26.	Transportation Right of Ways
27.	Unclaimed Property Payments
28.	Utility Bill Payments for Company Properties
29.	Utility Distribution Company Payments (Only for Constellation Retail Use)
30.	Vendor Refunds (Only for Accounts Payable Use)
31.	Voucher Companies Paid via Automated Feed from other Exelon Systems
32.	Wage Garnishments
33.	Wholesale Energy and Renewable Settlements

Constellation

SIC Codes

Here are the SIC Codes and their descriptions that are available for you to choose in the Registration form:

SIC Codes	Description
V01	INSURANCE RELATED PAYMENTS (ONLY FOR BSC INSURANCE USE)
V02	BANK FEES, INTEREST AND DIVIDENDS (ONLY FOR BSC TREASURY USE)
V03	CORPORATE MEMBERSHIP DUES
V04	EMPLOYEE BENEFITS (ONLY FOR HUMAN RESOURCES USE)
V05	HUMAN RESOURCES REIMBURSEMENTS
V06	FEDERAL, STATE, CITY, & LOCAL TAXES
V07	BOARD OF DIRECTORS/TRUSTEE FEES (ONLY BSC LEGAL GOVERNANCE)
V09	WAGE GARNISHMENTS
V10	CORPORATE CLAIMS
V12	WHOLESALE ENERGY AND RENEWABLES SETTLEMENTS
V13	PAYMENTS TO OR MANDATED BY GOVERNMENT AGENCIES
V14	UTILITY BILL PAYMENTS FOR COMPANY PROPERTIES

SIC Codes (Contd.)

APOLLO

Here are the SIC Codes and their descriptions that are available for you to choose in the Registration form:

SIC Codes	Description
V15	STORM EVENT PAYMENTS FOR MUTUAL ASSISTANCE
V16	BULK POSTAGE ACCOUNTS
V18	DONATIONS (DOCUMENTATION OF CORPORATE RELATIONS APPROVAL)
V19	REAL ESTATE AGREEMENT PAYMENTS (ONLY FOR REAL ESTATE USE)
V20	TRANSPORTATION RIGHT OF WAYS (UTILITY MAINTENANCE BASED)
V21	<$30K ONE-TIME INDIVIDUAL SPEAKER FEES (NO AGENCIES)
V22	BANK FEES RELATED TO M&A/DIVESTURES (ONLY BSC CORP DEV)
V23	CUSTOMER REFUNDS
V24	BROKER PAYMENTS (ONLY CONSTELLATION RETAIL AND WHOLESALE OPS
V25	SUPPLIER CREDITS (ONLY FOR ACCOUNTS PAYABLE USE)
V26	VENDOR REFUNDS (ONLY FOR ACCOUNTS PAYABLE USE)
V27	ESCHEATMENTS (ONLY FOR ACCOUNTS PAYABLE USE)

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SIC Codes (Contd.)

APOLLO

Here are the SIC Codes and their descriptions that are available for you to choose in the Registration form:

SIC Codes	Description
V28	BANK PAYMENTS SUPPORTING CORP. CREDIT CARD PROGRAM (ONLY AP)
V29	UNCLAIMED PROPERTY PAYMENTS (SEE CA-DO-105 - ONLY FOR AP)
V30	LEGAL SERVICES (SEE LG-DO-3102 AND RC-CC-11 - ONLY LEGAL USE
V31	UDC PAYMENTS (ONLY FOR CONSTELLATION RETAIL USE)
V32	PAYMENT TO LOCAL PUBLICATION FOR ADS OR LEGAL NOTICES
V33	<$30K EVENT SPONSORSHIPS (NOT POLITICAL OR CHARITABLE ORGS)
V34	CHIEF SUPPLY OFFICER APPROVED VOUCHERS ONLY
V35	INTERCOMPANY-PROJECT FINANCE SETTLEMENT
V36	CO-OWNER REIMBURSEMENTS
V99	CONSTELLATION ONLY - TEMPORARY TRANSITION CODE
V38	CORPORATE POLITICAL CONTRIBUTIONS - PER LE-AC-23
V39	FINANCIAL MANAGEMENT FEES
V40	TSA BILLING - FINANCE APPROVED ONLY

Constellation