

<u>A</u>POLLO

## Uploading Documents in Supplier Portal

Job Aid

Last Updated - 1/22/24



## Purpose

This document outlines the steps to upload documents to your Supplier Portal profile. Examples of documents which may need to be uploaded are, W8 and W9 tax forms, Certificates of Insurance, Women-owned and Minority owned Business Enterprise (WMBE) certificates which are called "business classification certificates" in our system, Proof of Charitable Designation and/or Banking information.

Uploading these certificates is a crucial step in ensuring compliance and verifying the qualifications of suppliers.

Documents you upload are restricted to limited viewing to protect your PII. Only you, other user(s) in your company with access to the company profile and the limited number of members of Constellation's Supplier Master Team have access to view attachments.

## Terms and Definitions

Sl. No:	Term:	Definition
1.	Business Classification:	It is the Oracle term for identifying Women-owned and Minority owned Business Enterprise (WMBE) classes
2.	PII/ Personally Identifiable Information:	It is 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.
3.	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.
4.	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.

W-9 and W-9 forms must be dated and signed

other than interest and	dividends, you are not required to sign the certificati	on, but you must provide your correct TIN	See t	he ins	structions for Part II, later.
Sign Here U.S. person		Date ►	7	2/	2020
General Inst	ructions	Form 1099-DIV (dividends, include)	uding	those	from stocks or mutual





## Process

To upload attachments to your profile:

1. Log into Oracle.

The Oracle Cloud Home page is displayed.

- a. Click the Supplier Portal tab.
- b. Click the Supplier Portal info-tile.

ORACLE	
Good afternoon,	
1a Supplier Portal Tools Others	
APPS 1b	
Supplier Portal	



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.

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Supplier Portal				
Search Orders V Order Number	् ्			
Tasks			G	3
Consigned Inventory  • Review Consumption Advices Invoices and Payments  • Create Invoice  • View Invoices  • View Payments Negotiations	Supplier News           Please visit https://www.consteliationenergy.com/our-work/suppliers/latest-updates.html for the link to our           Supplier Code of Conduct.           Please visit https://www.consteliationenergy.com/our-work/suppliers/involcing-and-payments.html to access our linvoicing and Payments FAQ page           Oracle User Guides & Resources are available here (https://www.constellationenergy.com/our-work/suppliers/involcing-and-payments.html.	**		
View Active Negotiations     Manage Responses  Qualifications     Manage Questionnaires     View Qualifications  Company Profile     Manage Profile	Please ensure your W-8 is updated every two years. For Tax help TBD.			•

3. On the Organization Details tab of the Company Profile page, click the Upload/View Documents hyperlink.

ORACLE			
Company Profile ⑦			Edit Done
Last Change Request 2117	Requested By Ryan, Shawn	Change Description	
Request Status Canceled	Request Date 7/5/23		
			le
Organization Details Tax Identifiers Addresses Contacts Payments	Business Classifications Products and Services		
⊿ General			
Company WW GRAINGER INC	Tax Organization Type	Corporation	
Supplier Number 900003738	Status	Active 3	
Supplier Type Supply		Upload/View Documents	



4. The Manage Attachments page is displayed.

Here, you can upload the necessary documents and also view existing documents. To upload a new document, Click the Browse hyperlink to browse for the required document on your computer.

ORACLE						
Manage Attachments - I	PO-Supplier					Done
					Tip - Click on the Browse icon to	
			Tip - File typ	e(s) allowed to upload - jpg, gif, png, 7z, csv, x	ls, xlsx, txt, zip, jlf, doc, docx, ppt, pptx, rtfc, pdf Tip - Maximum permissable File size	
Supplier Tax	123 80		Supplier Name WW GRAIN	NGER INC		
		Browse		Select or drop files here.		
Document(s) selected for Upload						
Category		File Name		Clear	Upload Status	
No data to display.						
Uploaded Document(s)						
Category	File Name		Upload Status	Attached By	Attached Date (UTC)	Remove
From Supplier	exelon_logo8 - Co	py.csv	~	Aashal Kamdar	08-24-2023 08:56:57	$\times$



- 5. The Open pop-up window is displayed to for you to browse your computer for the required document.
  - a. Select the required document from the list.
  - b. Click the Open button.

🧿 Open					$\times$
$\leftarrow$ $\rightarrow$ $\checkmark$ $\uparrow$	« Doc	uments > Certifications	ٽ v	🔎 Search Certifi	cations
Organize 🔹 Ne	ew folder				• 🔳 🕜
🖈 Quick access	^	Name		Date mod	lified 5
Desktop	*	Test_Certificate of Insurar	nce.docx	9/1/2023	
🖊 Downloads	*				
Documents	*				
Pictures	*				
This PC					
i Network	¥ ·	<			>
	File nam	e: Test_Certificate of Insurance	docx ~	All Files (*.*) Open	<ul> <li>Cancel</li> </ul>

6. The Document selected for Upload section displays the selected file Click the Upload button.

				Tip - Maximum p	ermissable File size selected for upload is 50 MB
Supplier Creation Date	06-21-2023	s	upplier Name WW	GRAINGER INC	
Tax Payer ID	361150280				
		Browse Sel	ect or drop files here.		
Document(s) selected for Upload Category		File Name		Clear	Upload Status
From Supplier	v	Test_Certificate of Insurance	docx	$\times$	
		Upload Clear A	JI		



7. The newly uploaded document is displayed under the Uploaded Document(s) section. Click the Done button to return to the Company Profile page.

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Manage Attachment	ts - PO-Supp	olier					Don
						Tip - Click on the Browse icon to se	lect 7 Jploade
				Tip - File type(s) allowed t	o upload - jpg, gif, png, 7z, csv, xls, x	xlsx, txt, zip, jlf, doc, docx, ppt, pptx, rtfc, pdf, g	
						Tip - Maximum permissable File size sel	ected for upload is 50 M
Sup	oplier Creation Date	06-21-2023		<b>C</b>	plier Name WW GRAING		
				Sup	plier Name WW GRAING	ER INC	
	Tax Payer ID	361150280					
			Browse	Select	or drop files here.		
Document(s) selected for U	pload						
Category			File Name		Clear	Upload Status	
No data to display.							
Uploaded Document(s)							
Category		File Name		Upload Status	Attached By	Attached Date (UTC)	Remove
From Supplier	exelor	_logo8 - Copy	.csv	~	Aashal Kamdar	08-24-2023 08:56:57	$\times$
From Supplier	Test Certifi	icate of Insurar	nce.docx	~	Shawn Ryan	09-01-2023 12:35:56	×

You have successfully completed the steps to upload and attach documents to your profile.