

Quick Reference Guide (NON-PO supplier)

Oracle Fusion : The Supplier Portal
Instructions in how to use the portal

Version: December 2024

Introduction

Welcome to Johnson Controls Oracle Fusion: The Supplier Portal Quick Reference Guide (QRG). The purpose of this guide is to give you step-by-step instructions on how to use the most critical sections of the Supplier Portal.

The Supplier Portal offers you wide visibility of various Purchasing to Pay details such as invoice and payment status where you can self-serve. It also gives you access to item and price agreements. We encourage you to avail of this free and secure service.

Introduction

- [How to access and navigate](#)
- [Settings and Preferences](#)
- [Notifications](#)
- [How to view and update your contacts on Company Profile](#)
- [How to create an invoice](#)
- [How to create an invoice \(Intended Use – VAT related\)](#)
- [How to view invoice status](#)
- [How to view payment status](#)
- [How to know when the invoice will be paid](#)
- [Forgot password and/or username](#)
- [Support](#)

Oracle Fusion – Supplier Portal

Oracle Fusion is a cloud-based system with a global template. New releases are often deployed with new functionality and some adjustments to existing functionality. Currently JCI does not use all functionality, however we focus our training and support on the sections that are most critical for you. We will send you updates on training as we implement new functionality or changes.

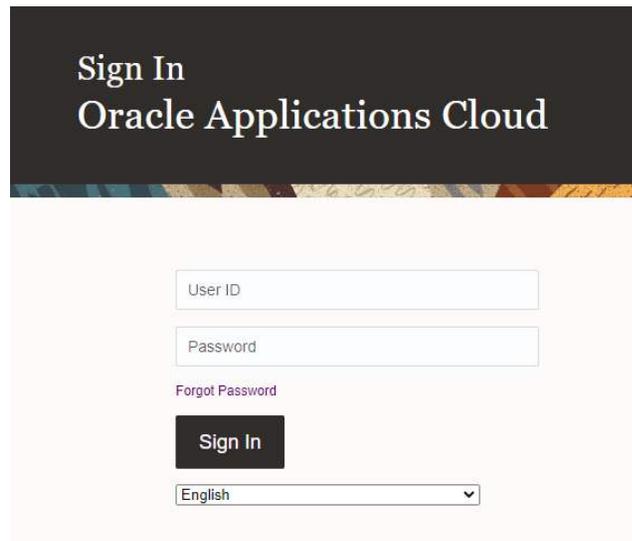
Your access level impacts the functionality and screens you see in the system. Sometime the screens you see may change slightly or differ to the training materials due to new Oracle releases or your access levels.

For any questions, please email us at JCI-EMEA-PROCURECO-SUPPLIERCOMMS@jci.com

How access and navigate the Supplier Portal

1. Click on link to Supplier Portal using Chrome or Edge:

[Sign In \(oraclecloud.com\)](https://oraclecloud.com)



The screenshot shows the Oracle Applications Cloud Sign In page. At the top, there is a dark header with the text "Sign In Oracle Applications Cloud". Below the header, there are two input fields: "User ID" and "Password". Under the "Password" field, there is a link for "Forgot Password". Below the input fields is a black "Sign In" button. At the bottom, there is a language selection dropdown menu currently set to "English".

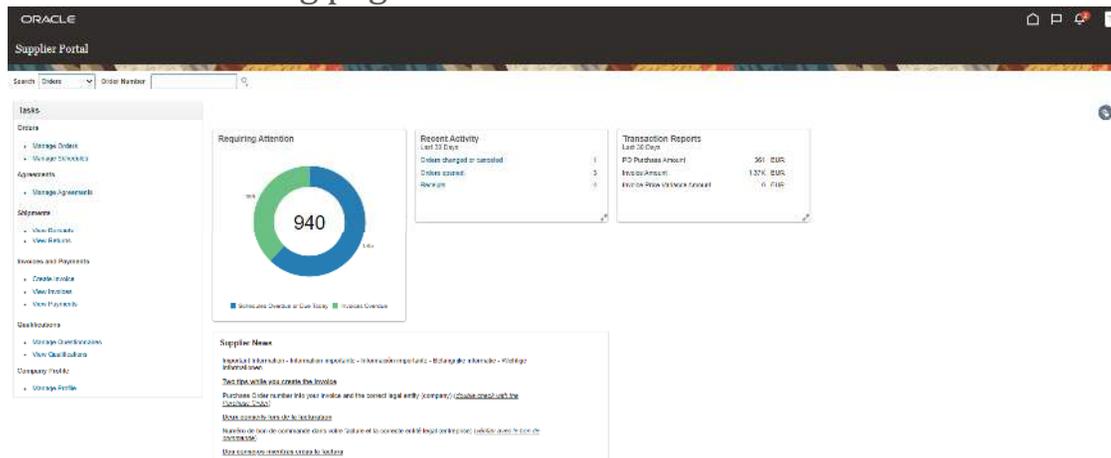
2. Input user ID and password as provided in a Welcome notification you received by email

How access and navigate the Supplier Portal

3. Select the Supplier Portal tab and click on the tile 'Supplier Portal'



4. You will now see the Portal landing page



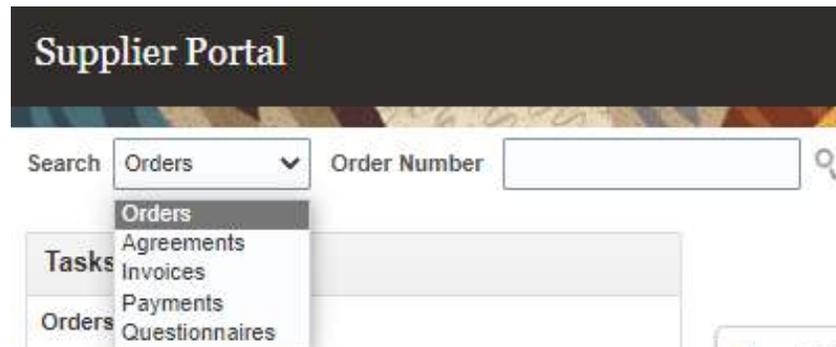
How access and navigate the Supplier Portal

5. You will see the home  , Bell,  and Settings  icons are on the top right of every screen



6. The Search and Tasks sections on the left-hand side of the landing page are where you will access the important areas of the Portal such as viewing POs, invoices, payments and agreements

7. To quickly access your orders, agreements, invoices or payments, navigate to 'Search' field and select from the drop-down menu. Then click on the 'Magnifying glass' icon



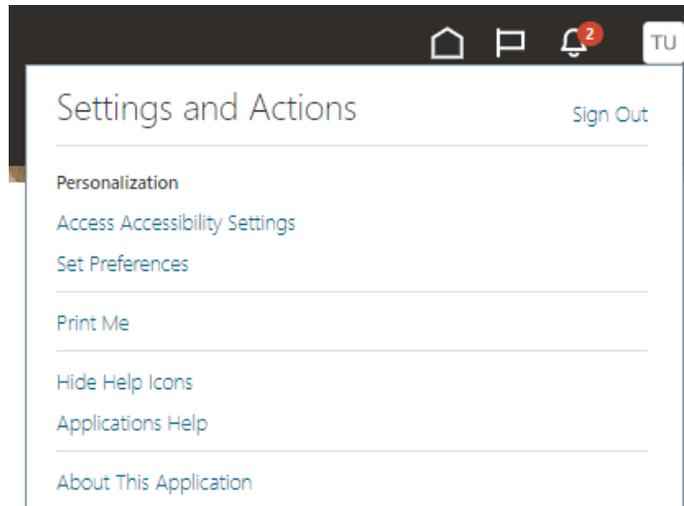
Settings and Preferences

Signing out

1. If you wish to sign out, navigate to the initials of your name at the top right corner (Settings icon) of your screen and click

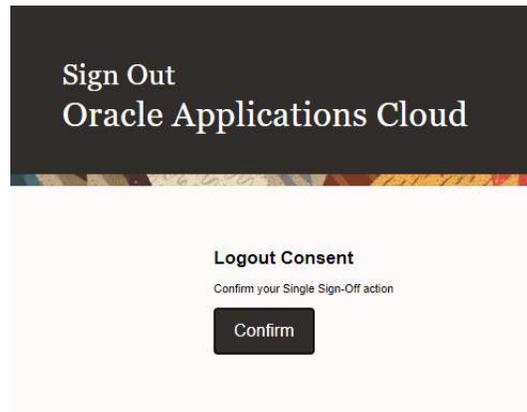


2. Then click on « Sign Out »



Settings and Preferences

3. If you wish to continue exiting, click on 'Confirm'



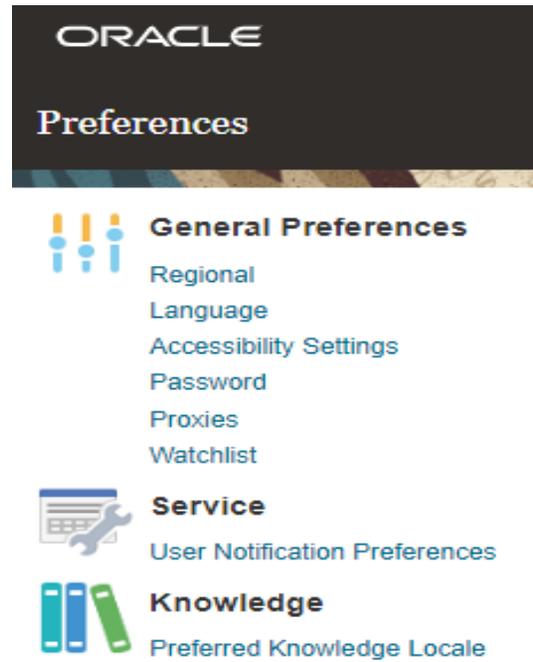
Setting General Preferences

1. If you wish to set up your preferences, navigate to Settings and Preference (initials of your name at the top right corner of your screen) and select the icon :



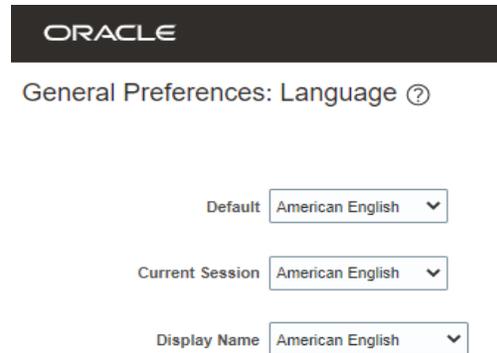
Settings and Preferences

2. Then click on 'Set Preferences'



Settings and Preferences

3. Then click on 'Language'



The screenshot shows the Oracle 'General Preferences: Language' dialog box. It features the Oracle logo at the top left and a title bar. Below the title bar, there are three dropdown menus for language selection:

- Default: American English
- Current Session: American English
- Display Name: American English

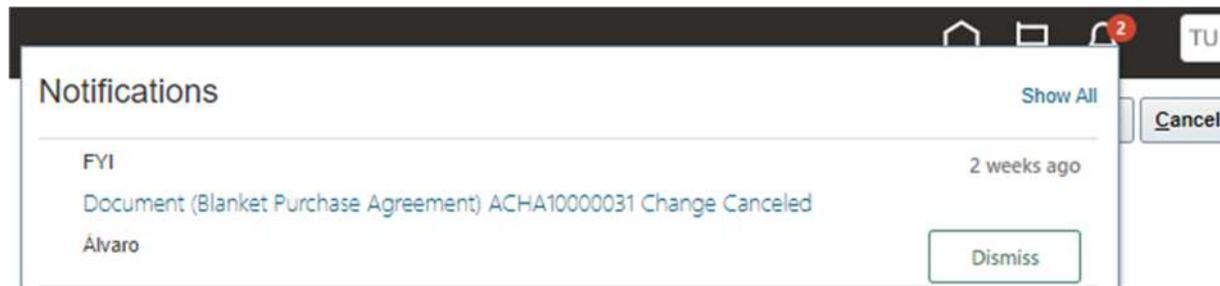
4. Adjust all your language preferences in the following fields: 'Default', 'Current Session' and 'Display Name'

5. To save your changes, click on 'Save and Close'

6. To discard your changes, click on 'Cancel'

Notifications

1. Click on the Bell icon at the top right corner of Supplier Portal: 
2. For viewing all your notifications click on Show All, otherwise you will see only the most recent notifications



3. There are two types of notifications: FYI and Action Required. In addition to notifications in Oracle Fusion, you will also receive an email

How to view and update your contacts on Company Profile

This task is required to ensure all your company contacts are setup to access the Portal:

1. Click on 'Manage Profile' on the task bar on the Supplier Portal landing page.
2. Go to the Contacts tab to review who in your profile is setup to access the Supplier Portal
3. To update your Contacts tab, click 'Edit' in the upper right corner of the screen

ORACLE
Company Profile

Level Change Request: 402004 Request Status: Cancelled Requested By: Request Date: Change Description:

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

General
Company: GLOF
Supplier Number: 1200
Supplier Type: FIELD MATERIALS
Tax Organization Type: Corporation
Status: Active
Attachments: None

Identification
D.U.M.S. Number:
Customer Number: SIC
National Insurance Number:
Corporate Web Site: www.danfoss.es

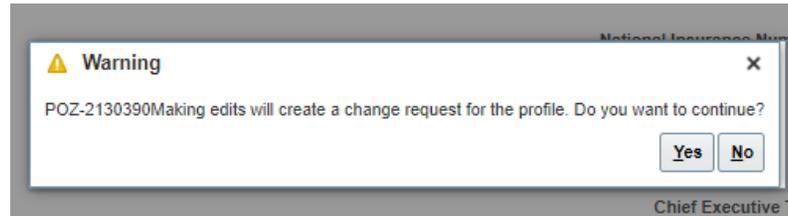
Corporate Profile
Year Established:
Mission Statement:
Year Incorporated:

Financial Profile
Current Fiscal Year's Potential Revenue:
Preferred Functional Currency:
Fiscal Year End Month:

Edit Type

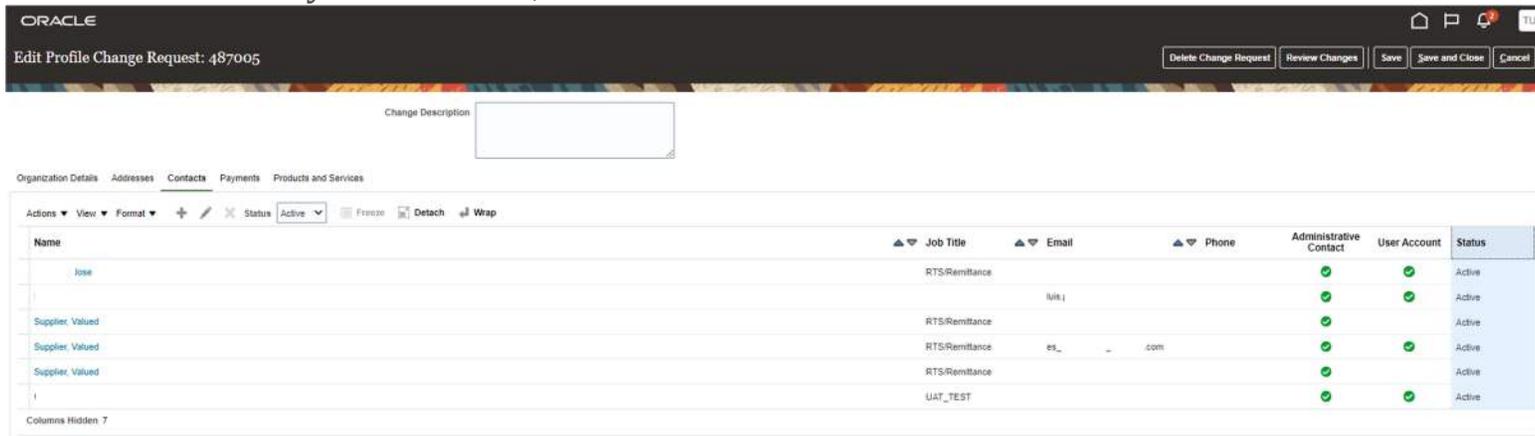
How to view and update your contacts on Company Profile

4. You will see a pop-up warning message indicating that your action will create a change request to update your profile



5. Click on 'Yes' to create a change request

6. If you want to review or edit your contacts, click on 'Contacts' tab



ORACLE
Edit Profile Change Request: 487005

Change Description

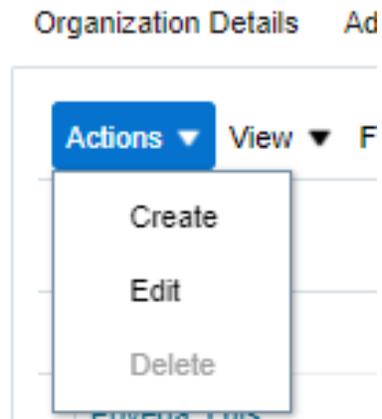
Organization Details Addresses **Contacts** Payments Products and Services

Name	Job Title	Email	Phone	Administrative Contact	User Account	Status
Jose	RTS-Remittance			✓	✓	Active
Supplier, Valued	RTS-Remittance	luis.j		✓	✓	Active
Supplier, Valued	RTS-Remittance	es_..._...com		✓	✓	Active
Supplier, Valued	RTS-Remittance			✓	✓	Active
	UAT_TEST			✓	✓	Active

Columns Hidden 7

How to view and update your contacts on Company Profile

7. If you wish to create a contact, click on the '+' icon or go to 'Actions' and then select 'Create' from the drop-down menu



How to view and update your contacts on Company Profile

- 8. Enter contact details. In addition to the required fields marked with *, please ensure you add phone details and address. Check the administrative access if the contact requires the ability to manage contact details

Create Contact ✕

Salutation

* First Name

Middle Name

* Last Name

Job Title

Administrative contact

Phone

Mobile

Fax

Email

Status

▲ Contact Addresses

Actions View Format X Freeze Detach Wrap

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

▲ User Account

Request user account

Roles Data Access

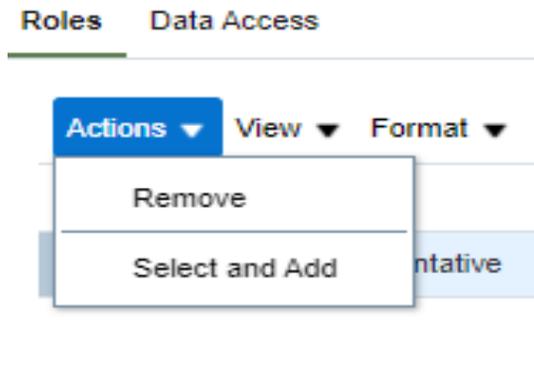
Actions View Format X Freeze Detach Wrap

Role	Description
------	-------------

Create Another OK Cancel

How to view and update your contacts on Company Profile

10. To assign roles to your contact, navigate to 'Roles', click on 'Actions' and 'Select and Add'



How to view and update your contacts on Company Profile

11. To assign roles to your contact, navigate to 'Roles'. Select the desired roles, one at a time or use the CTRL button, and click on 'Apply' after each selection. Then click 'Ok

Select and Add: Roles ✕

▲ Search

Role Description

View ▼ Format ▼ Wrap

Role	Description
XX SM Supplier Accounts Receivable Specialist	Manages invoices and payments for the ...
XX SM Supplier Customer Service Representative Job	Manages inbound purchase orders and c...
XX SM Supplier Sales Representative	Manages agreements and deliverables f...
XX SM Supplier Self Service Administrator Abstract	Manages the profile information for the s...
XX SM Supplier Self Service Clerk Abstract	Manages the profile information for the s...

Rows Selected 1

How to view and update your contacts on Company Profile

Supplier Role	Description
XX SM Supplier Accounts Receivable Specialist	Manages invoices and payments for the supplier company. Primary tasks include submitting invoices as well as tracking invoice and payment status.
XX SM Supplier Sales Representative	Manages agreements and deliverables for the supplier company. Primary tasks include acknowledging or requesting changes to agreements in addition to adding catalogue line items with customer specific pricing and terms. Updates contract deliverables that are assigned to the supplier party and updates progress on contract deliverables for which the supplier is responsible.
XX SM Supplier Self Service Administrator	Manages the profile information for the supplier company. Primary tasks include updating supplier profile information and requesting user accounts to grant employees access to the supplier application. Can manage profile and edit data.
XX SM Supplier Self Service Clerk	Manages the profile information for the supplier company. Primary tasks include updating supplier profile information and requesting user accounts to grant employees access to the supplier application
XX SM Supplier Customer Service Representative Job	Manages the profile information for the supplier company. Primary tasks include updating supplier profile information and requesting user accounts to grant employees access to the supplier application

How to view and update your contacts on Company Profile

12. To confirm the creation, click on 'Ok'

Create Contact X

Salutation:

* First Name:

Middle Name:

* Last Name:

Job Title:

Administrative contact

Phone:

Mobile:

Fax:

Email:

Status:

Contact Addresses

Actions View Format X Freeze Detach Wrap

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

User Account

Request user account

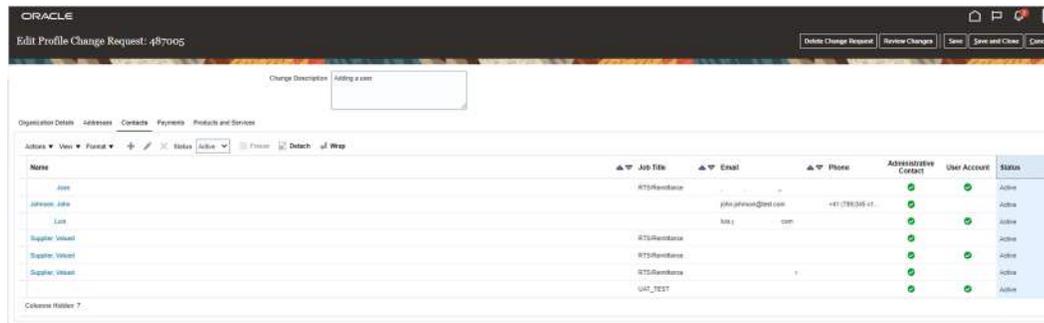
Roles Data Access

Actions View Format X Freeze Detach Wrap

Role	Description
XX SM Supplier Sales Representative	Manages agreements and deliverables for the supplier company. Primary tasks include acknowledging or requesting changes...
XX SM Supplier Self Service Clerk Abstract	Manages the profile information for the supplier company. Primary tasks include updating supplier profile information and requ...

How to view and update your contacts on Company Profile

13. When you have completed your updates, click 'Review Changes'

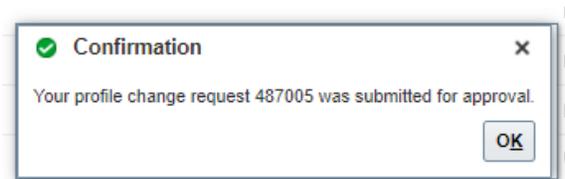


14. To finish the process, click on 'Submit'



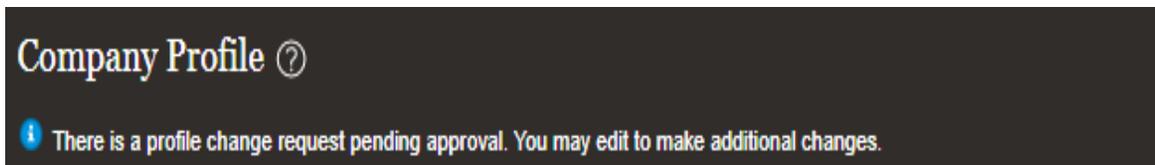
How to view and update your contacts on Company Profile

15. How to view and update your contacts on Company Profile



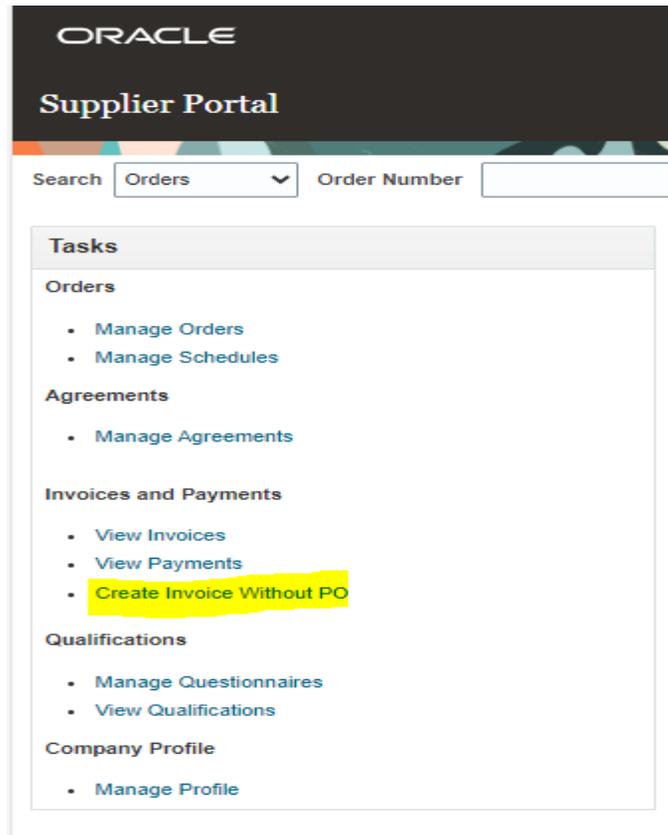
16. Your changes will be sent for an approval within JCI. Until changes are approved, this message will appear on your screen

'There is a profile change request pending approval. You may edit to make additional changes.'



How to create an invoice

1. Go and click here:



How to create an invoice

2. You are getting this view:

ORACLE

Create Invoice Without PO

Invoice Actions: Save Save and Close Submit Cancel

The Save and Close button does not submit the invoice. Please, use the "Submit" button for actually submitting the invoice.

Supplier
Taxpayer ID
* Supplier Site
Address
Supplier Tax Registration Number

Remit-to Bank Account
Unique Remittance Identifier
Unique Remittance Identifier Check Digit
Description
* Attachments: None

* Number
* Date: m/d/yy
* Type: Invoice
Invoice Currency
Payment Currency

Customer
Customer Taxpayer ID
Name
Address
* Requester Email
Requester Name

Lines

View + - Cancel Line

* Number	* Type	* Ship-to Location	Ship-from Location	* Amount	Description	Intended Use	* Tax Contr Amount
No data to display.							

Summary Tax Lines

View

Line	* Regime	* Tax Name	Tax Jurisdiction	* Tax Status	* Rate Name	Percentage	Per Unit	Amount

How to create an invoice

3. To get your invoice submitted correctly, you need to fill in the mandatory fields. They are marked with a blue asterisk.

4. Please, follow the steps below:

- a) **Important to know before starting:** In your own invoice the correct legal entity must be written along with all criteria described in our Golden rules. Please, pay a visit at our FAQs
- b) Select your site (*from where you shipped from*) through “ Supplier Site”. (*By selecting the site, “Customer Taxpayer ID” and “Remit-to Bank Account” are automatically filled in.*)
- c) Attach your invoice in PDF here:

ORACLE

Create Invoice Without PO

Invoice Actions Save Save and Close Submit Cancel

The Save and Close button does not submit the invoice. Please, use the "Submit" button for actually submitting the invoice.

Supplier

Taxpayer ID

* Supplier Site

Address

Supplier Tax Registration Number

Customer

Customer Taxpayer ID

Remit-to Bank Account

Unique Remittance Identifier

Unique Remittance Identifier Check Digit

Description

* Attachments None

Name

Address

* Number

* Date m/d/yy

* Type Invoice

Invoice Currency

Payment Currency

* Requester Email

Requester Name

How to create an invoice

- d) Put the number of your invoice in the “Number” field. (Note: the invoice number must be a unique number otherwise our system rejects it as counted as duplicates.)
- e) Put the date of your invoice. Present day or in the future.
- f) Through “Type” choose if this is an invoice or a credit memo.
- g) Put in the “Requester Email”, the email of the Supplier owner (If you do not know, please, look at your contract or email us at: JCI-EMEA-PROCURECO-SUPPLIERCOMMS@JCI.COM).
- h) Add the lines which you want to invoice by clicking on the icon “ + ” (*you can add up how many lines you need.*)

Lines

View ▼    Cancel Line

* Number	* Type	* Ship-to Location	Ship-from Location	* Amount	Description
No data to display.					

←

Summary Tax Lines

How to create an invoice

i) Fill in the lines (N.B: *For each line, you will need to repeat those step below.*)

Lines

View ▾ + 📄 ✕ Cancel Line

* Number	* Type	* Ship-to Location	Ship-from Location	* Amount	Description	Intended Use	* Tax Control Amount
1	Item ▾	▾	▾			▾	
Total							

Select the “Ship-to Location” ; meaning to where you have shipped your goods/ provided your services.

Select the “Ship-from Location” ; meaning from where you have shipped your goods/ your services – it will be your site(s).

In “Amount” section, put the price for the line ; meaning the price without the VAT that you wish to invoice.

In “Description” section, put a description.

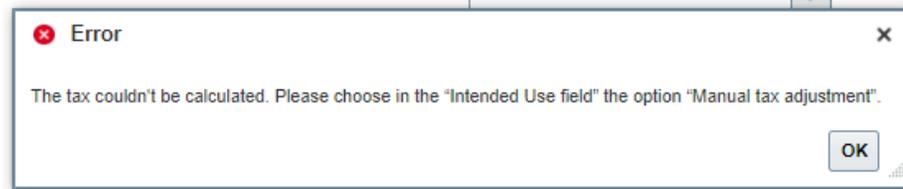
In “Intended Use” section ; please, see section: How to create an invoice (Intended Use – VAT related) {link}

In “Tax Control Amount” section, put the amount of the VAT for the selected line.

How to create an invoice (Intended Use – VAT related)

In “Intended Use” ; you will **only** need to use that section in case of REVERSE CHARGE (VAT related)

You will know if you need to use this section as a pop-up windows will appear stating:



If this pop-up windows appears, please go to the “INTENDED USE” section and select only “Manual tax adjustment” and keep proceeding.

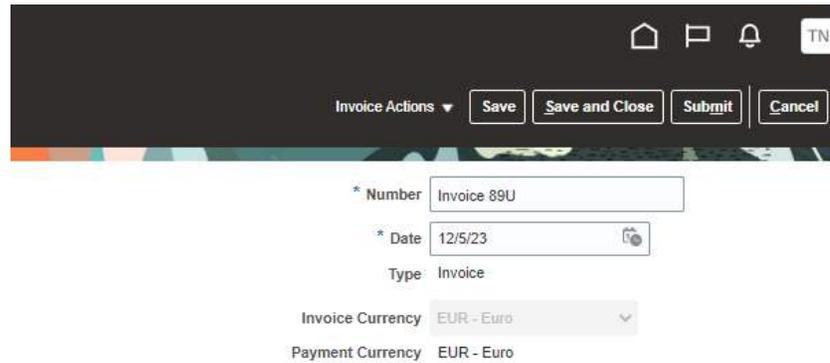
What is REVERSE CHARGE?

Example: you are in country A and you ship to country B (within the E.U.). And you ask to be exempted from the VAT.

To know more about REVERSE CHARGE, please, consult your local tax advisor.

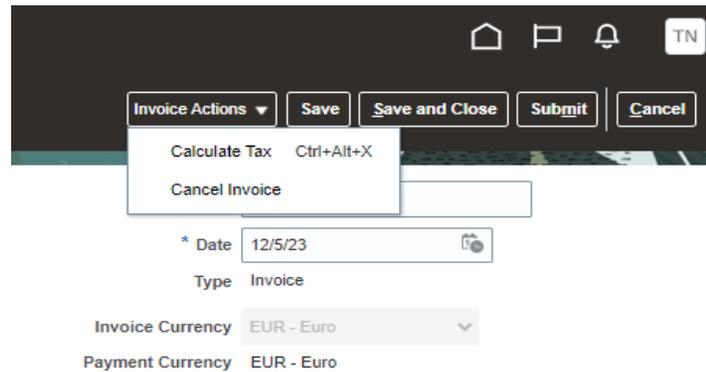
How to create an invoice

j) Once the lines are completed, please, go to : “Invoice Actions”



The screenshot shows a software interface with a dark header bar containing navigation icons (home, flag, bell) and a 'TN' label. Below the header, there is a menu labeled 'Invoice Actions' with a dropdown arrow. To the right of this menu are four buttons: 'Save', 'Save and Close', 'Submit', and 'Cancel'. Below the menu, there are several input fields: '* Number' with the value 'Invoice 89U', '* Date' with the value '12/5/23', 'Type' with the value 'Invoice', 'Invoice Currency' with a dropdown menu showing 'EUR - Euro', and 'Payment Currency' with the value 'EUR - Euro'.

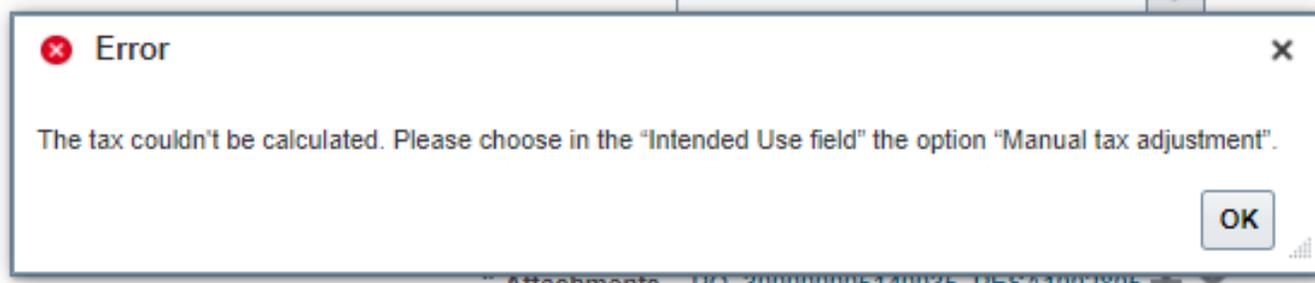
Then, click on “Calculate Tax”



The screenshot shows the same software interface as the previous one, but with the 'Invoice Actions' dropdown menu open. The menu has two options: 'Calculate Tax' with the keyboard shortcut 'Ctrl+Alt+X' and 'Cancel Invoice'. The 'Calculate Tax' option is highlighted. The rest of the interface, including the buttons and input fields, remains the same.

How to create an invoice

k) If a pop-up window appear stating:



You need to use the "Intended Use" section. Please, refer to: [How to create an invoice \(Intended Use – VAT related\)](#)

l) If the tax is calculated without a pop-up window. Please, press "Submit" button to submit your invoice.

Please, be aware that "Save" and " Save and Close" buttons do not mean your invoice has been submitted. It means that it has been saved and the status is in "Incomplete". You will need to take action on that invoice otherwise, it will not be paid as our system will never, per se, receive your invoice.

Please, note once your invoice is submitted you cannot cancel it. In such case, please, write us an email to our AP HD. {link}

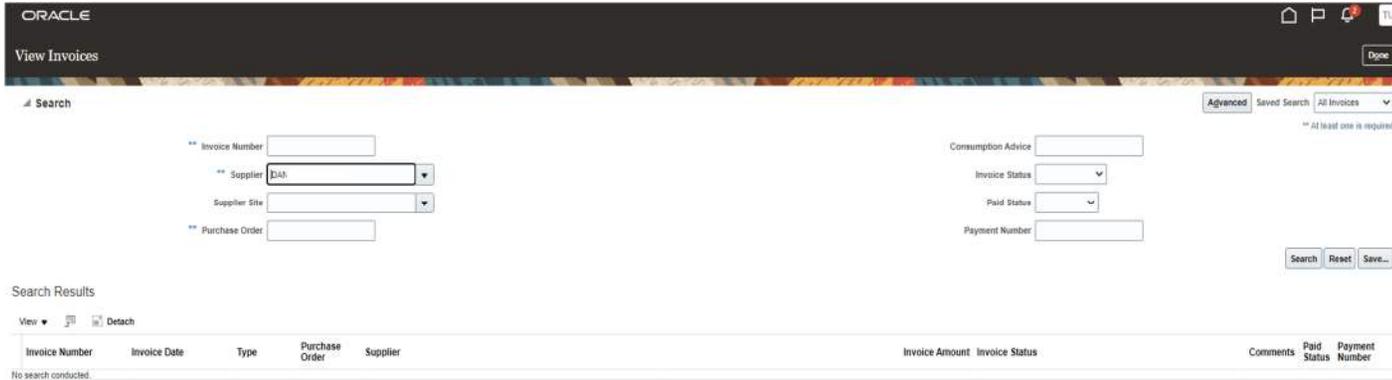
How to view invoice status

1. Click on 'View invoice'

The screenshot shows the Oracle 'View Invoices' search interface. At the top, there is a navigation bar with the Oracle logo, a home icon, a flag icon, a notification bell with a '2' badge, and a 'TU' user profile icon. Below the navigation bar, the page title 'View Invoices' is displayed on the left, and a 'Done' button is on the right. The main search area is titled 'Search' and contains several input fields: 'Invoice Number' (marked with **), 'Supplier' (marked with ** and a dropdown arrow), 'Supplier Site' (marked with ** and a dropdown arrow), 'Purchase Order' (marked with **), 'Consumption Advice', 'Invoice Status' (dropdown), 'Paid Status' (dropdown), and 'Payment Number'. There are also buttons for 'Advanced', 'Saved Search', and a dropdown for 'All Invoices'. A note states '** At least one is required'. Below the search fields are 'Search', 'Reset', and 'Save...' buttons. The 'Search Results' section shows a table with columns: Invoice Number, Invoice Date, Type, Purchase Order, Supplier, Invoice Amount, Invoice Status, Comments, Paid Status, and Payment Number. The table currently displays 'No search conducted.'

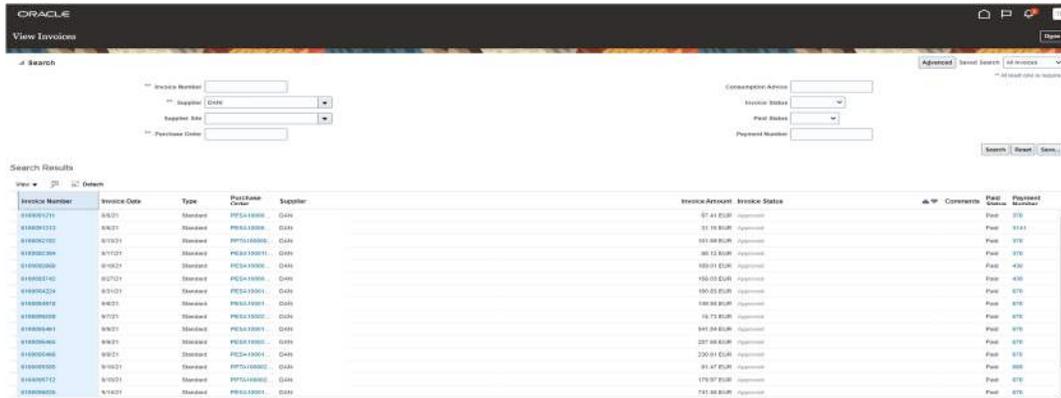
2. To search for an invoice, populate one of the following fields marked with asterisks **
- a. 'Invoice number' – if you are looking for a specific invoice
 - b. 'Supplier' – if you want to see all invoices of your company

How to view invoice status



3. Click on 'Search'

4. Invoice will be displayed in the section 'Search results'. If you wish to see the invoice details, click on the Invoice number



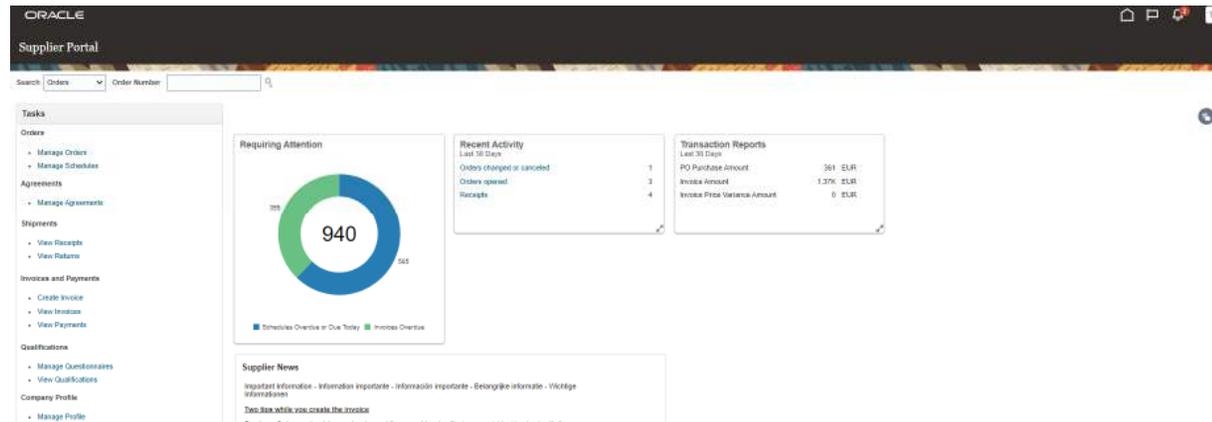
How to view invoice status

The status and their meaning

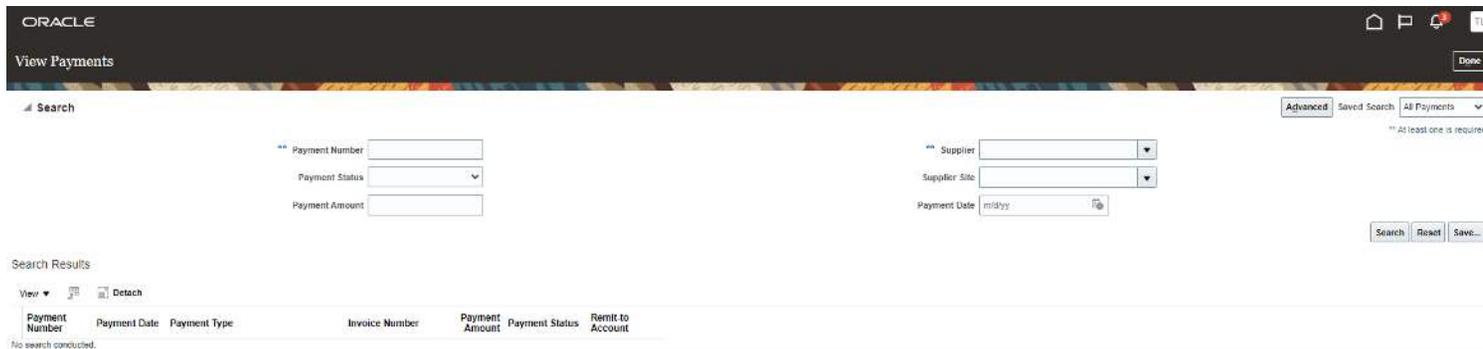
<u>Status in the Supplier Portal</u>	<u>Meaning</u>
Incomplete	You have not submitted your invoice. It is just saved. Please, review and submit, if necessary.
In process	Not yet validated
Processing	Under process
Approved	Invoice has been validated
Cancelled	Invoice has been cancelled
Paid	Invoice has been paid

How to view payment status

1. Click on « View Payment »



2. In the field 'Supplier', select your company from the drop-down menu. Then click 'Search'



How to view payment status

5. Paid invoices for this payment will be displayed
6. When you are done viewing the payments, click 'Done' at the top right corner of the screen

How to know when the invoice will be paid

1. You have to go to: "View Invoices"
2. You shall have this view:

** At least one is required

** Invoice Number

** Supplier

Supplier Site

** Purchase Order

Consumption Advice

Invoice Status

Paid Status

Payment Number

Search Results

View ▼   Detach

Invoice Number	Invoice Date	Type	Purchase Order	Payment schedule date	Supplier	Supplier Site
<hr/>						

How to know when the invoice will be paid

3. If you do not have the column called: "Payment schedule date". Please follow those quick steps to get it:

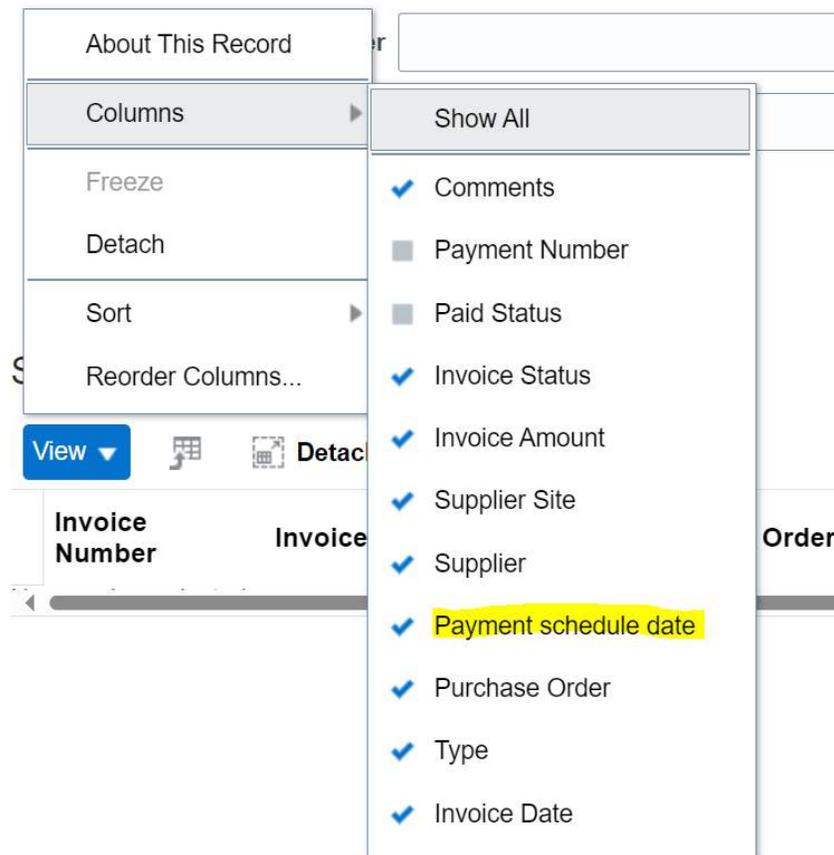
3.1 Click on "View" and then on "Column"

The screenshot shows a software interface with a table. A context menu is open over the 'Invoice Number' column header. The menu items are: 'About This Record', 'Columns', 'Freeze', 'Detach', 'Sort', and 'Reorder Columns...'. Below the menu is a toolbar with a 'View' button, a grid icon, and a 'Detach' button. The table below has columns for 'Invoice Number', 'Invoice Date', and 'Type'.

Invoice Number	Invoice Date	Type
----------------	--------------	------

How to know when the invoice will be paid

3.2 Look for “ Payment schedule date” throughout the drop-down menu



How to know when the invoice will be paid

3.3 Once you have clicked on it, the new column will appear and will stay always on your view.

4. The “Payment schedule date” column will give you the date of when your invoice will be paid, and it will appear for each invoice.

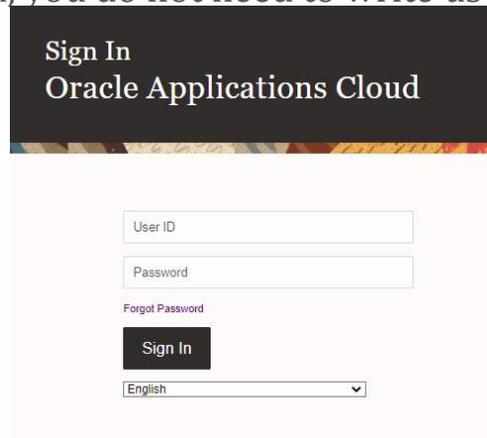
Please note that date is based on your payment terms as well as it includes our payment runs.

If you wish to know how our payment runs work, we invite you to visit our webpage at: [Procure-to-Pay \(PTP\) | Johnson Controls](#) (*that page also includes Invoice requirements*).

Besides, once the payment was made by us, you shall receive an email notification from : yourpaymentdetails@jci.com to your remittance email (*make sure it will not go to your junk folder*). Note: *if you are part of PrimeRevenue you will received this nofication.*

Forgot password and/or username

1. If you have forgotten your password, you do not need to write us an e-mail. On the login page, click on: "Forgot your password?"



Sign In
Oracle Applications Cloud

User ID

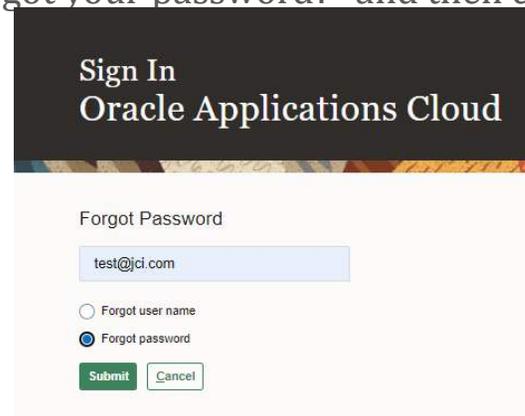
Password

Forgot Password

Sign In

English

2. Enter your email address, select "Forgot your password?" and then click "Submit"



Sign In
Oracle Applications Cloud

Forgot Password

test@jci.com

Forgot user name

Forgot password

Submit Cancel

Forgot password and/or username

4. An email will be sent to your email address. All you have to do is follow the instructions which are written in the email. If you have forgotten your username, you also do not need to write us an e-mail. It's the same process as "Forgot your password?"

5. Enter your email address, select "Forgot Username" and then click "Submit"



The screenshot shows the 'Sign In Oracle Applications Cloud' interface. The 'Forgot Password' section is active, with the email address 'test@jci.com' entered in the input field. The 'Forgot user name' radio button is selected, and the 'Submit' button is highlighted in green.

7. An email will be sent to your email address. You will just have to follow the instructions which are written in the email.



Support

- In case you require additional information about the Supplier Portal, please visit our webpage which is dedicated for you to get a smooth journey: [Oracle Fusion Supplier Portal Learning Hub | Johnson Controls](#)
- For any specific questions related to Portal usage, please reach out to the Supplier Enablement team at:

JCI-EMEA-PROCURECO-SUPPLIERCOMMS@JCI.COM

- In case you have additional questions to Invoice and payment status which the Portal does not provide – please visit the following page for more [Procure-to-Pay \(PTP\) | Johnson Controls](#)

**We hope that Quick Reference
guide has been helpful.**