

# Quick Reference Guide (NON-PO supplier)

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

## Introduction

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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.

The critical areas are:

- [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](#)
- [Forgot password and/or username](#)
- [Support](#)

## Oracle Fusion – Supplier Portal

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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.

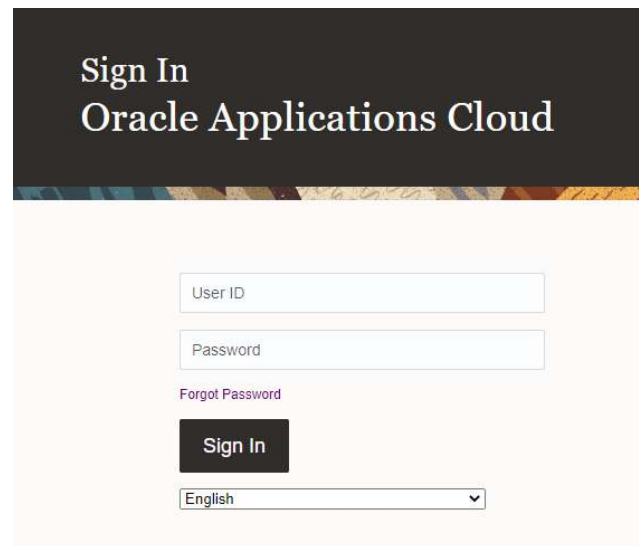
For any questions, please email us at [JCI-EMEA-PROCURECO-SUPPLIERCOMMS@jci.com](mailto:JCI-EMEA-PROCURECO-SUPPLIERCOMMS@jci.com)

## How access and navigate the Supplier Portal

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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". Underneath the "Password" field, there is a link for "Forgot Password". A black "Sign In" button is positioned below the "Forgot Password" link. At the bottom of the form, there is a dropdown menu currently set to "English".

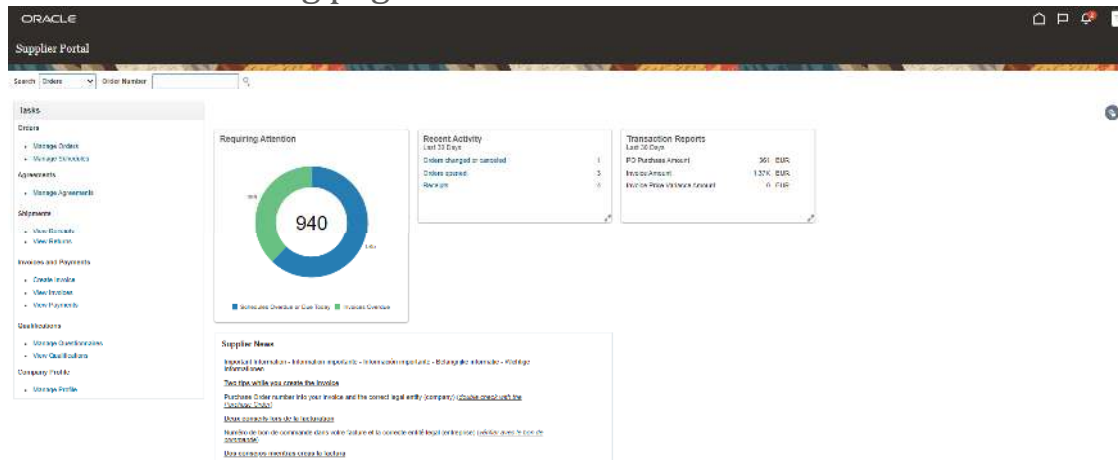
2. Input user ID and password as provided in a Welcome notification you received by email

# 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



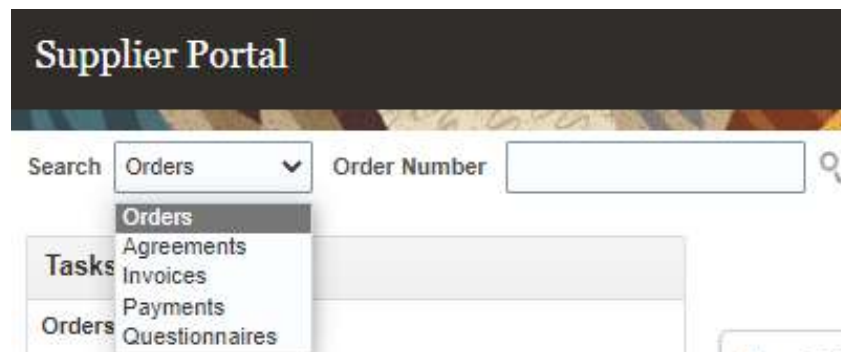
## How access and navigate the Supplier Portal

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



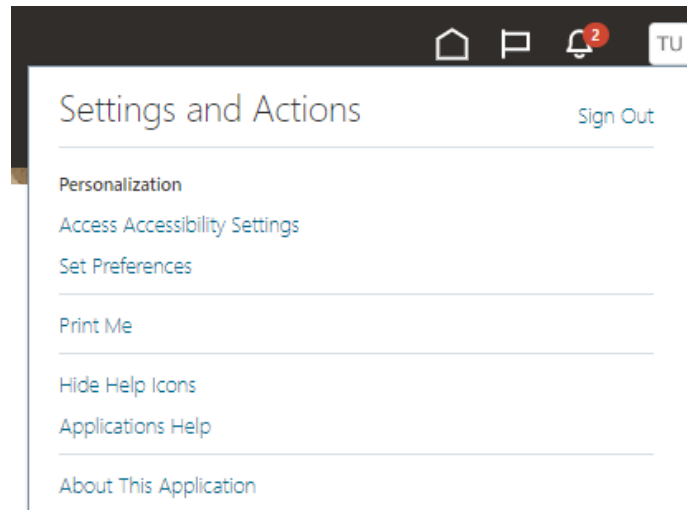
# Settings and Preferences

## *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



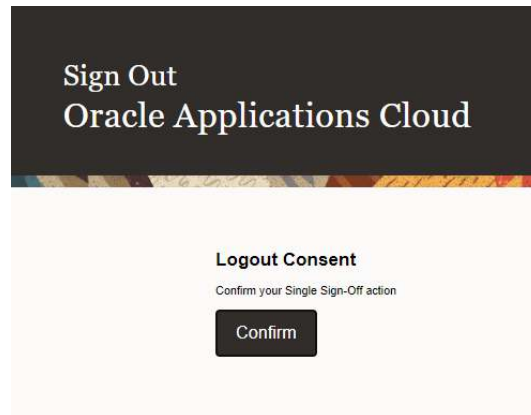
2. Then click on « Sign Out »



## Settings and Preferences

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



### *Setting General Preferences*

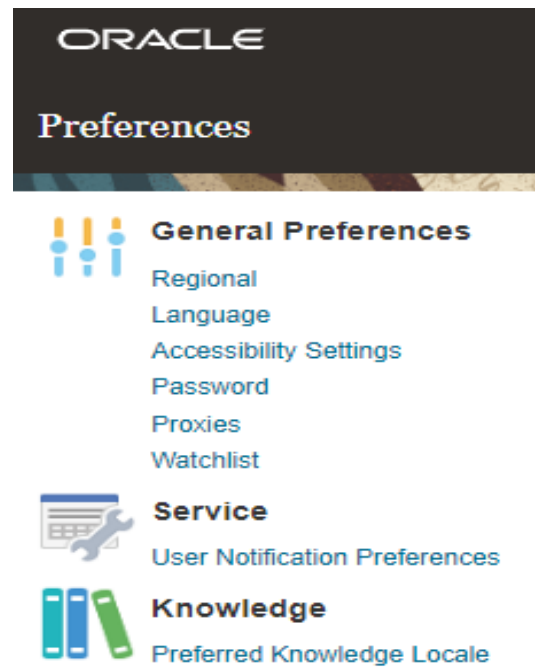
1. If you wish to set up your preferences, navigate to Settings and Preference (initials of your name at the top right corner of your screen) and select the icon :





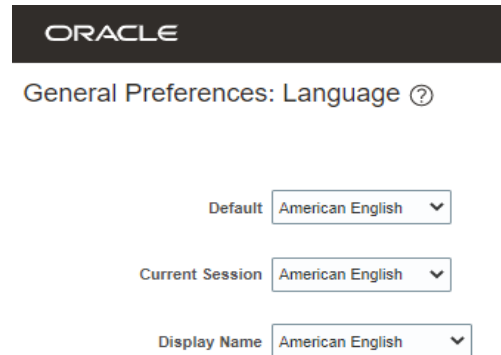
# Settings and Preferences

2. Then click on 'Set Preferences'



## Settings and Preferences

3. Then click on 'Language'



The screenshot shows the Oracle 'General Preferences: Language' settings page. At the top, there is a dark header with the 'ORACLE' logo. Below the header, the title 'General Preferences: Language' is displayed with a help icon. Three dropdown menus are visible, each labeled with a preference name and set to 'American English':


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

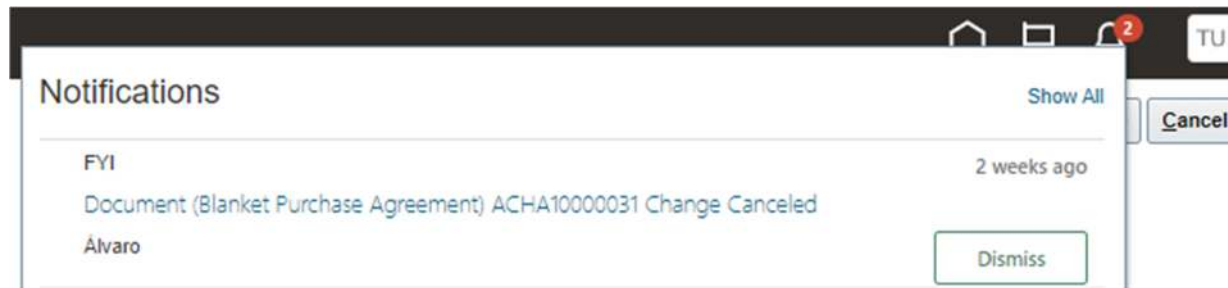
4. Adjust all your language preferences in the following fields: 'Default', 'Current Session' and 'Display Name'

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

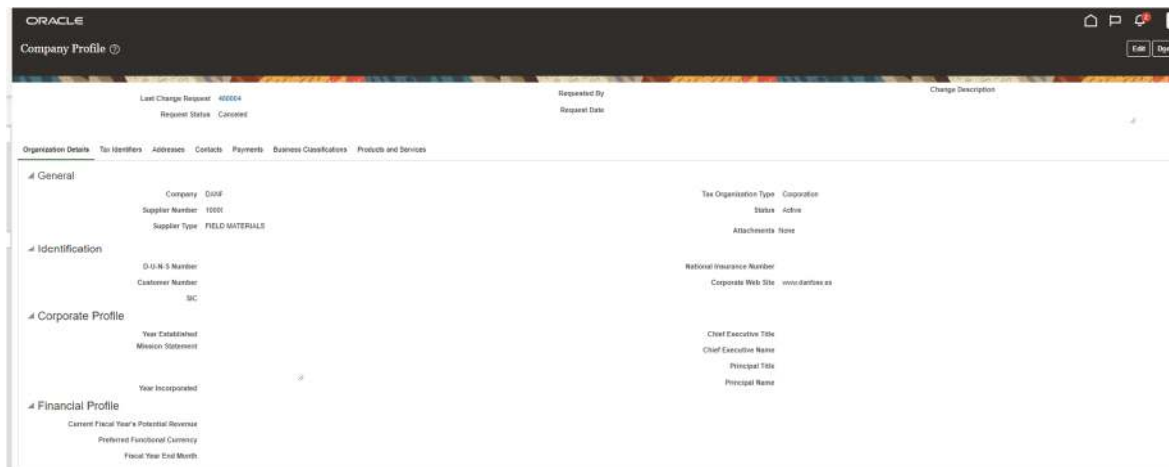


3. There are two types of notifications: FYI and Action Required. In addition to notifications in Oracle Fusion, you will also receive an email

# How to view and update your contacts on Company Profile

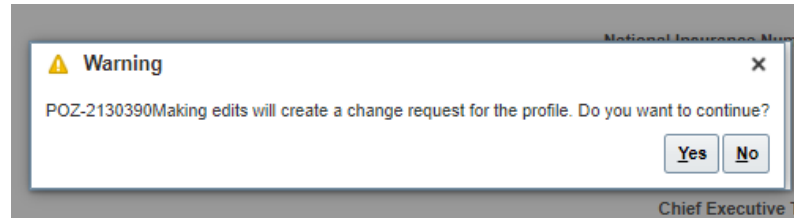
This task is required to ensure all your company contacts are setup to access the Portal:

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



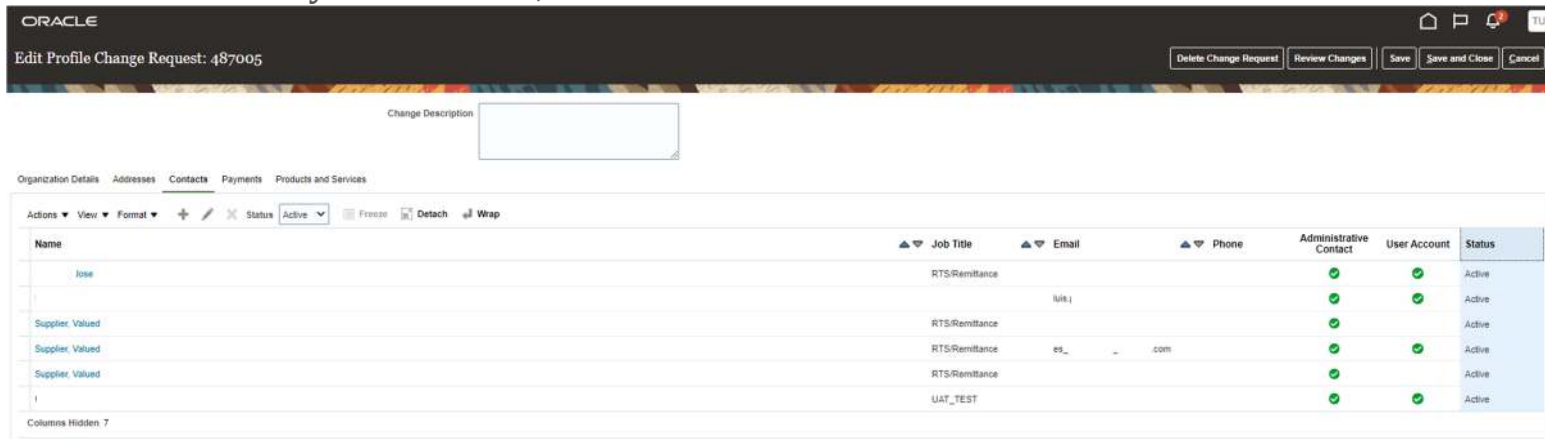
## How to view and update your contacts on Company Profile

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

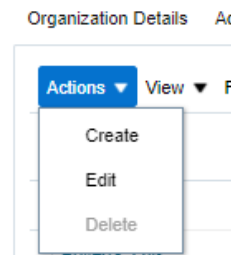
Organization Details Addresses **Contacts** Payments Products and Services

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

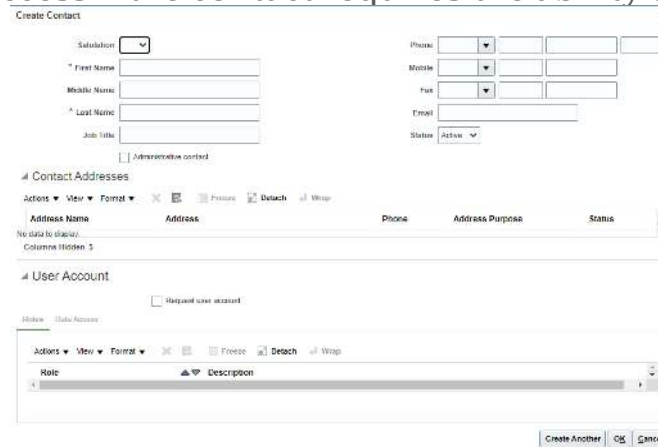
Columns Hidden 7

## 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



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

A screenshot of the "Create Contact" form. The form is divided into several sections. The top section contains fields for "Salutation", "First Name", "Middle Name", "Last Name", and "Job Title". To the right of these fields are fields for "Phone", "Mobile", "Fax", "Email", and "Status". Below this is a checkbox for "Administrative contact". The next section is "Contact Addresses", which includes a table with columns for "Address Name", "Address", "Phone", "Address Purpose", and "Status". Below this is a section for "User Account" with a checkbox for "Request user account". At the bottom, there is a table with columns for "Role" and "Description". The form ends with "Create Another", "OK", and "Cancel" buttons.

# How to view and update your contacts on Company Profile

9. Check the option 'Request User account' if the contact should have access to the Supplier Portal .

Create Contact x

Salutation

\* First Name

Middle Name

\* Last Name

Job Title

Administrative contact

Phone

Mobile

Fax

Email

Status

▲ Contact Addresses

Actions v View v Format v X Freeze Detach Wrap

Address Name	Address	Phone	Address Purpose	Status
No data to display.				

Columns Hidden 5

▲ User Account

Request user account

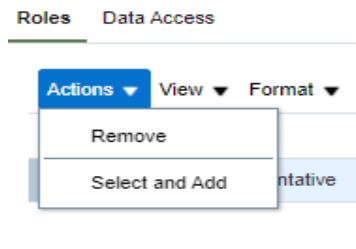
E-mail is required when requesting a user account

Roles Data Access

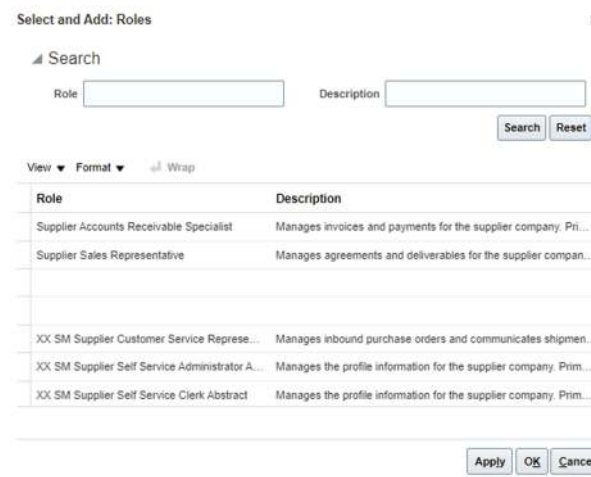
Role	Description
Supplier Sales Representative	Manages agreements and deliverables for the supplier company. Primary tasks include acknowledging or requesting changes to ...

## 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'



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'





## How to view and update your contacts on Company Profile

Supplier Role	Description
<b>Supplier Accounts Receivable Specialist</b>	Manages invoices and payments for the supplier company. Primary tasks include submitting invoices as well as tracking invoice and payment status.
<b>Supplier Sales Representative</b>	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.
<b>Supplier Self Service Administrator</b>	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.
<b>Supplier Self Service Clerk</b>	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
<b>XX SM Supplier Customer Service Representative Job</b>	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 v View v Format v X  Freeze Detach Wrap

Address Name	Address	Phone	Address Purpose	Status
No data to display.				

Columns Hidden 5

▲ User Account

Request user account

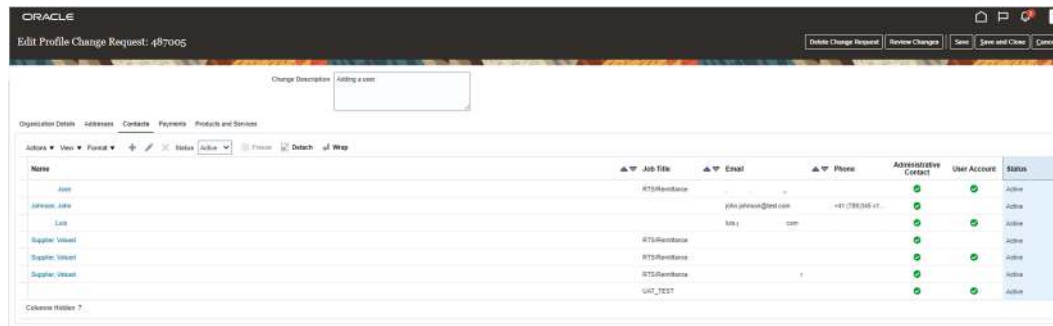
Roles Data Access

Actions v View v Format v X  Freeze Detach Wrap

Role	Description
Supplier Accounts Receivable Specialist	Manages invoices and payments for the supplier company. Primary tasks include submitting invoices as well as tracking invoice ...
Supplier Sales Representative	Manages agreements and deliverables for the supplier company. Primary tasks include acknowledging or requesting changes to ...
XX SM Supplier Customer Service Represe...	Manages inbound purchase orders and communicates shipment activities for the supplier company . Primary tasks include tracki...

# How to view and update your contacts on Company Profile

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

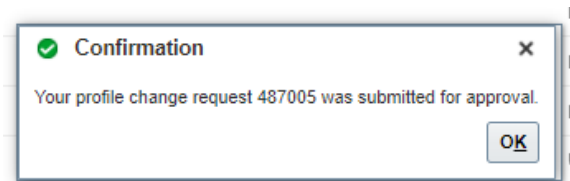


14. To finish the process, click on 'Submit'



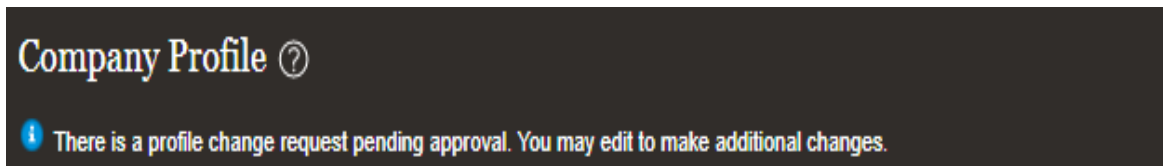
## How to view and update your contacts on Company Profile

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



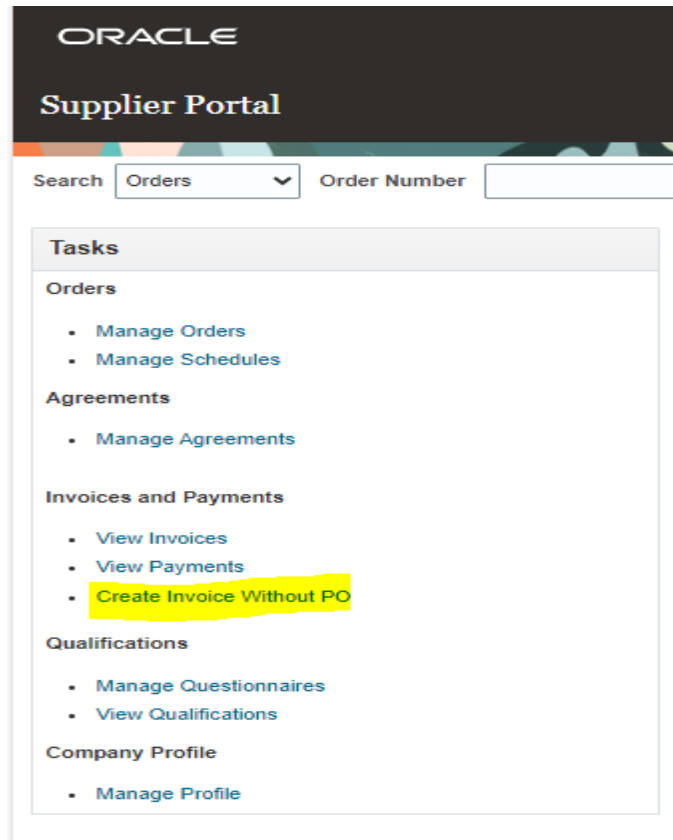
16. Your changes will be sent for an approval within JCI. Until changes are approved, this message will appear on your screen

'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 Home, Flag, Bell, TN

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

* 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:

The screenshot shows the Oracle 'Create Invoice Without PO' interface. At the top, there's a navigation bar with the Oracle logo and a title bar. Below the title bar, there are several sections of the form:




- Supplier Section:** Includes fields for Supplier, Taxpayer ID, \* Supplier Site (mandatory), Address, and Supplier Tax Registration Number.
- Remit-to Bank Account Section:** Includes a dropdown for Remit-to Bank Account, Unique Remittance Identifier, Unique Remittance Identifier Check Digit, Description, and \* Attachments (highlighted in yellow).
- Customer Section:** Includes a dropdown for Customer Taxpayer ID, Name, and Address.
- Invoice Details Section:** Includes \* Number (mandatory), \* Date (mandatory), \* Type (mandatory), Invoice Currency, and Payment Currency.
- Requester Information:** Includes \* Requester Email (mandatory) and Requester Name.

At the top right, there are navigation icons (home, flag, bell, TN) and an 'Invoice Actions' menu with buttons for Save, Save and Close, Submit, and Cancel. A note states: 'The Save and Close button does not submit the invoice. Please, use the "Submit" button for actually submitting the invoice.'

## 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](mailto: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.

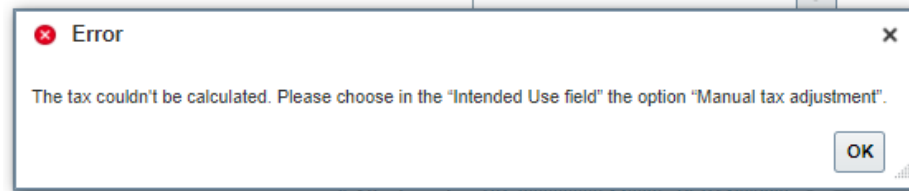
In “Intended Use” section ; please, see section: How to create an invoice (Intended Use – VAT related) {link}

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.

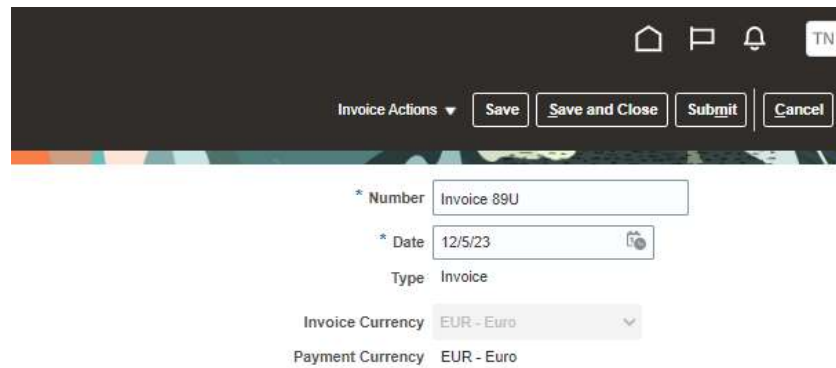
What is REVERSE CHARGE?

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.**

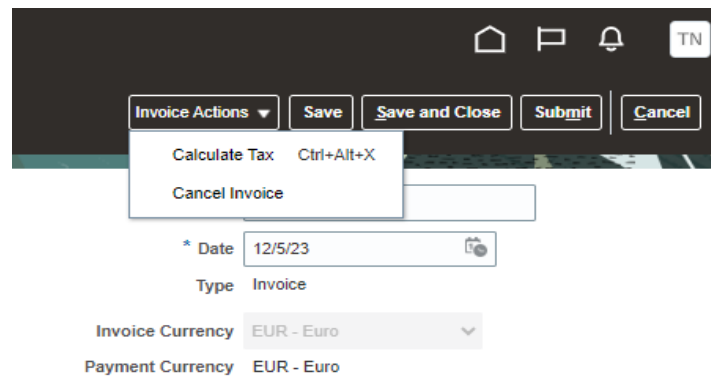
## How to create an invoice

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'.

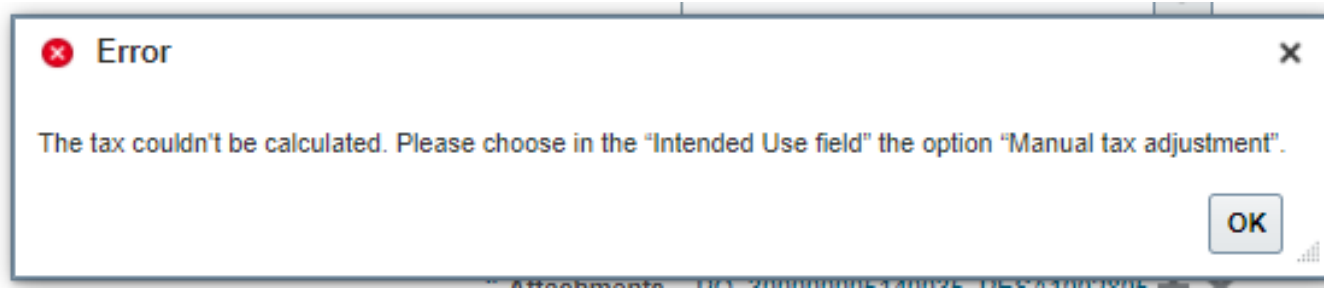
Then, click on “Calculate Tax”



The screenshot shows the same software interface as above, but with the 'Invoice Actions' dropdown menu open. The menu contains 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 as in the previous screenshot.

## 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}**

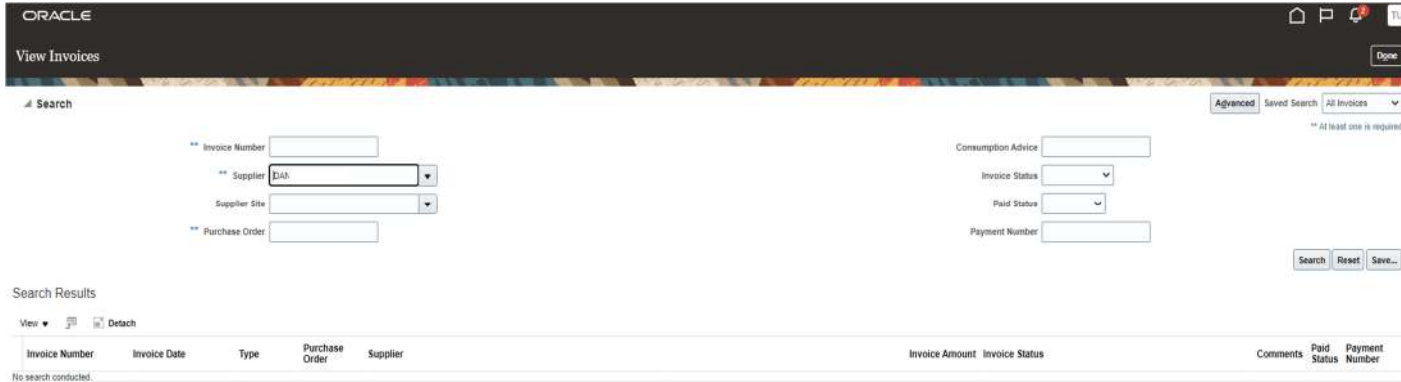
# How to view invoice status

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' 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', 'Supplier', 'Supplier Site', and 'Purchase Order' (all marked with double asterisks \*\*), 'Consumption Advice', 'Invoice Status', 'Paid Status', 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.'

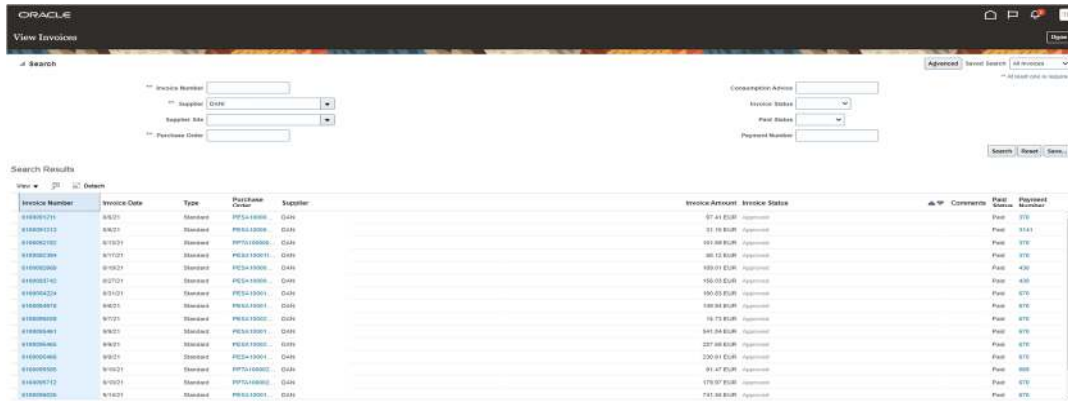
2. To search for an invoice, populate one of the following fields marked with asterisks \*\*
- a. 'Invoice number' – if you are looking for a specific invoice
  - b. 'Supplier' – if you want to see all invoices of your company

# 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



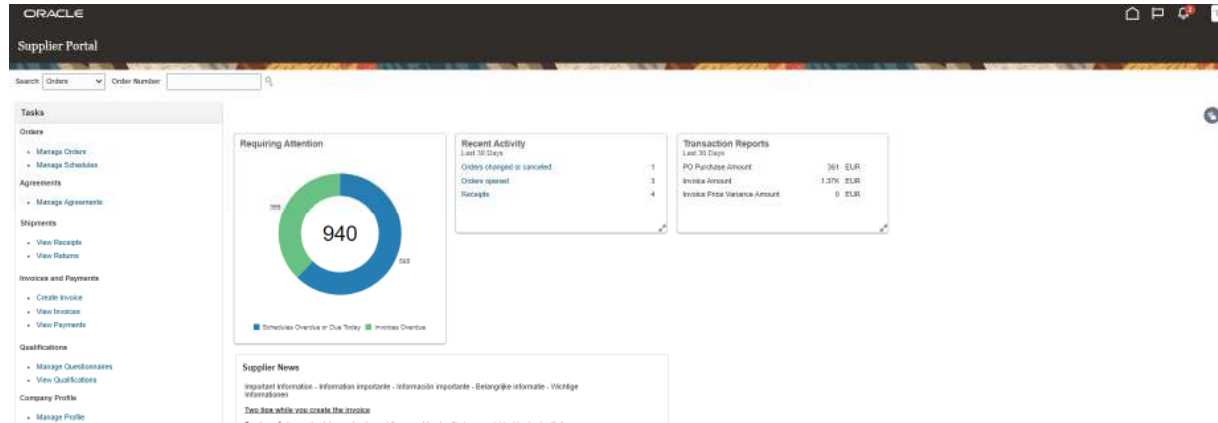
## How to view invoice status

The status and their meaning

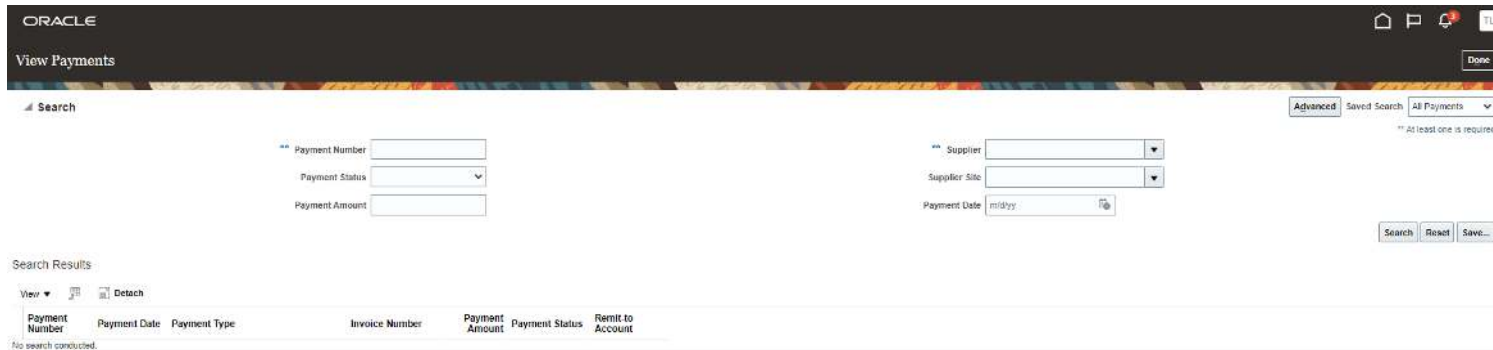
<u>Status in the Supplier Portal</u>	<u>Meaning</u>
<b>Incomplete</b>	You have not submitted your invoice. It is just saved. Please, review and submit, if necessary.
<b>In process</b>	Not yet validated
<b>Processing</b>	Under process
<b>Approved</b>	Invoice has been validated
<b>Cancelled</b>	Invoice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

# How to view payment status

1. Click on « View Payment »



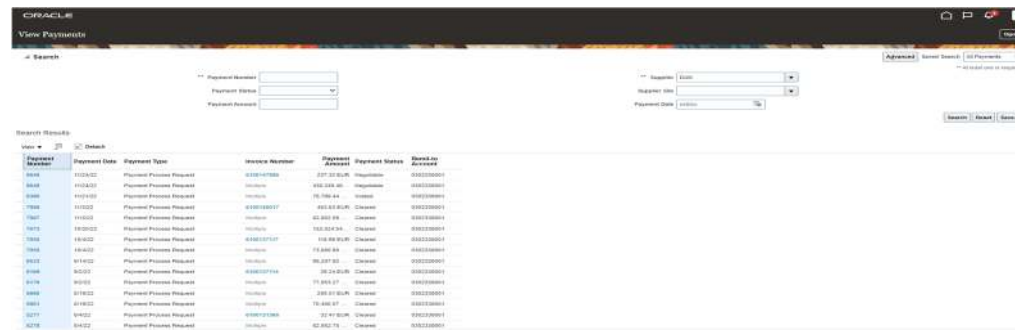
2. In the field 'Supplier', select your company from the drop-down menu. Then click 'Search'



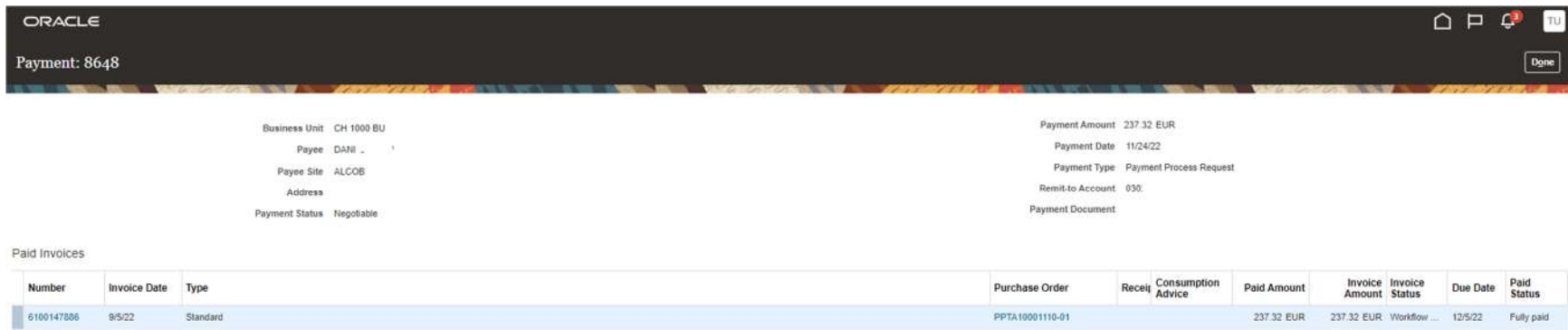


# How to view payment status

3. Payments will be displayed in the section 'Search results'



4. To see the payments details, click on the 'Payment number'



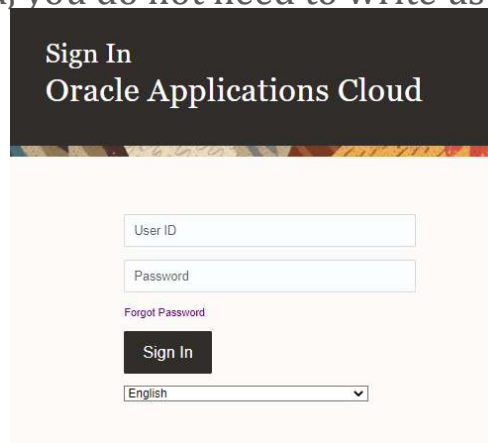
## How to view payment status

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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

## 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

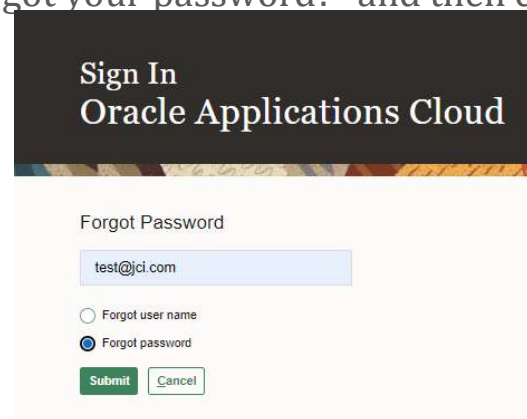
Password

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

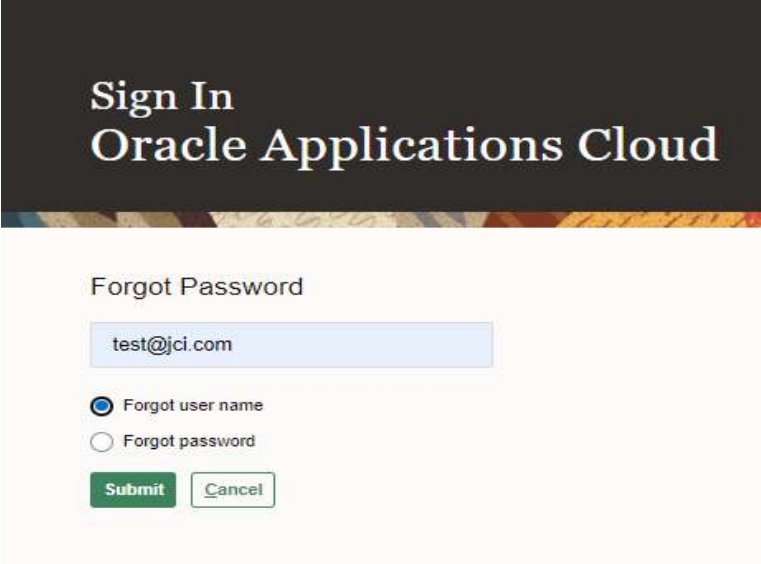
Forgot password

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

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- In case you require additional training to use the Portal please review the [training documents](#) where you can find reference guides and videos available in many languages.
- For any specific questions related to Portal usage, please reach out to the Supplier Enablement team at:

[JCI-EMEA-PROCURECO-SUPPLIERCOMMS@JCI.COM](mailto: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 [contact details](#)

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