

Quick Reference Guide (PO supplier)

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

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 PO details, 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](#)
- [How to view and edit agreements](#)
- [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.

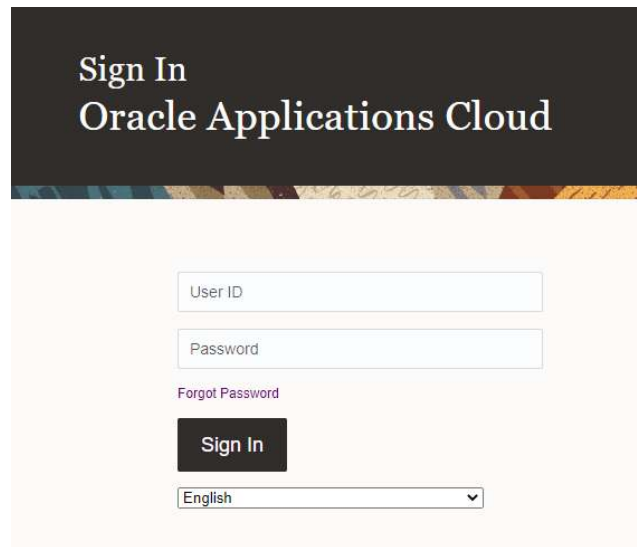
Your access level impacts the functionality and screens you see in the system. Sometime the screens you see may change slightly or differ to the training materials due to new Oracle releases or your access levels.

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".

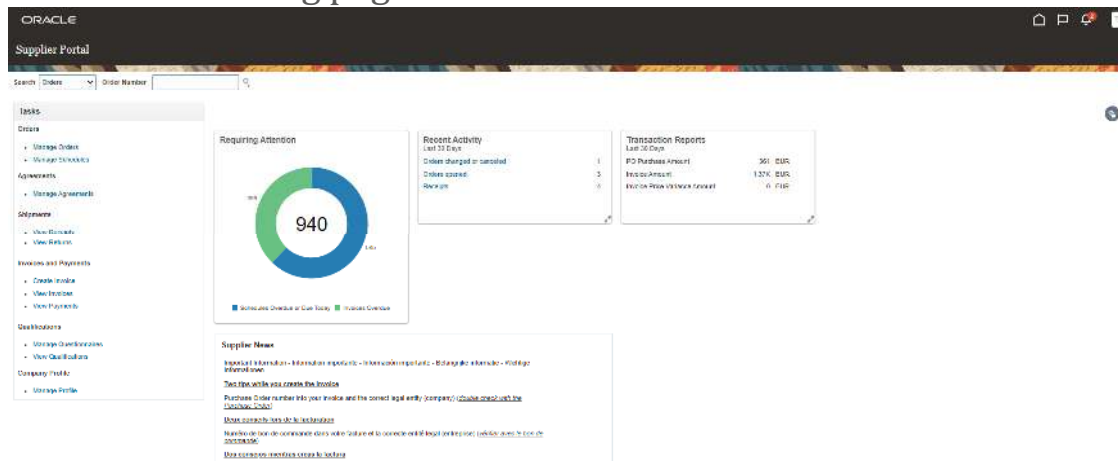
2. Input user ID and password as provided in a Welcome notification you received by email

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



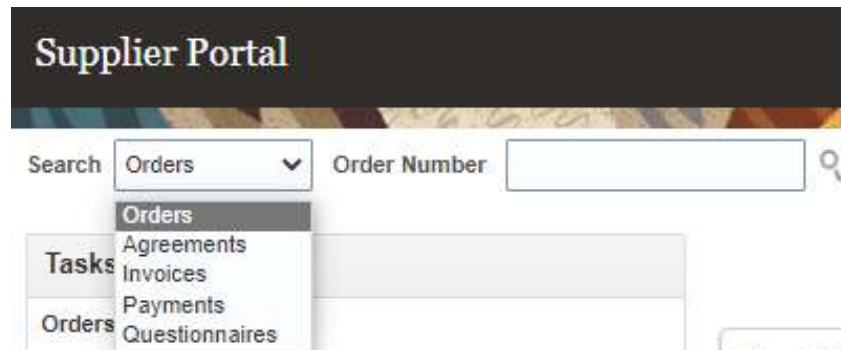
How access and navigate the Supplier Portal

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



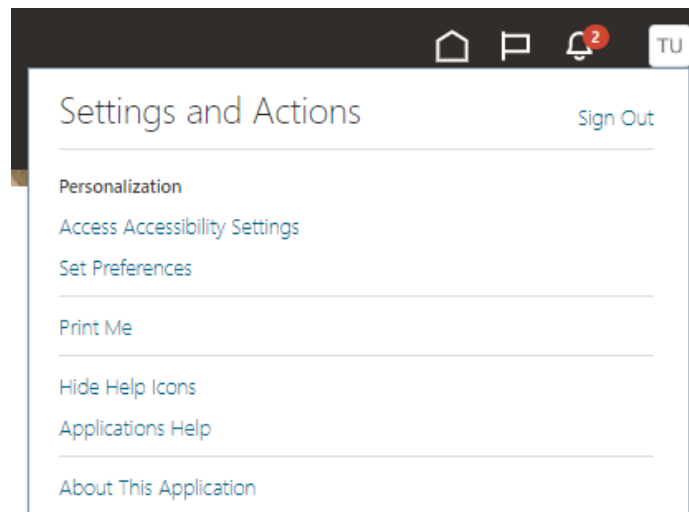
Settings and Preferences

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

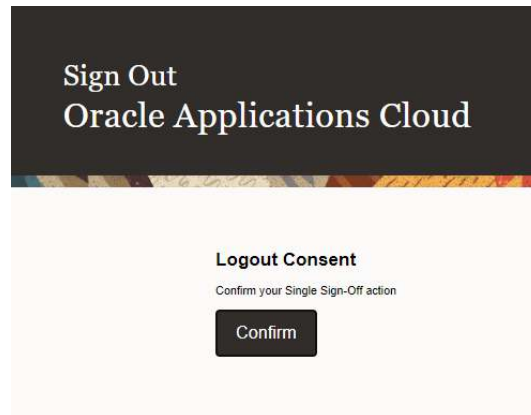


2. Then click on « Sign Out »



Settings and Preferences

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



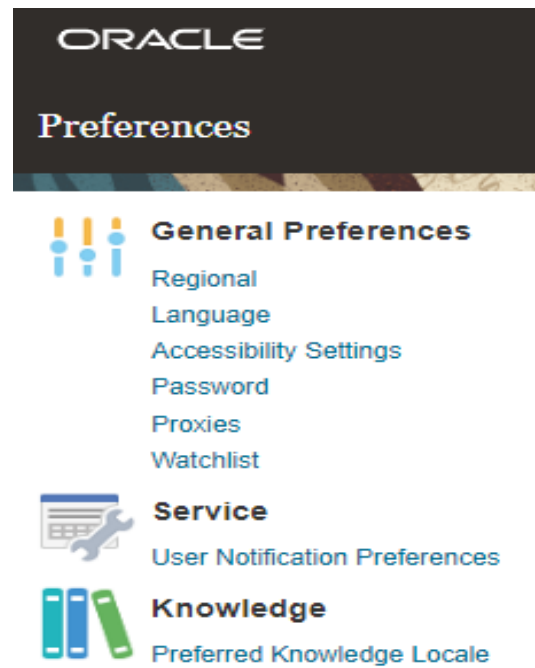
Setting General Preferences

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 :



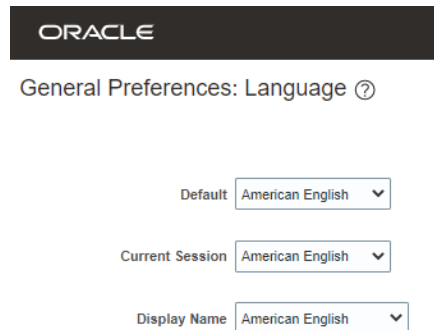
Settings and Preferences

2. Then click on 'Set Preferences'



Settings and Preferences

3. Then click on 'Language'



ORACLE

General Preferences: Language ?

Default American English ▼

Current Session American English ▼


Display Name American English ▼

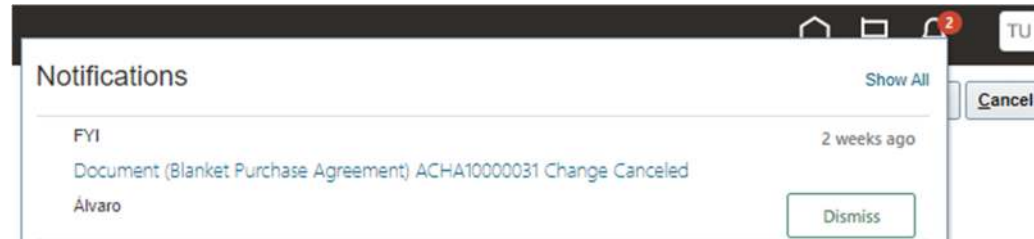
4. Adjust all your language preferences in the following fields: 'Default', 'Current Session' and 'Display Name'

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

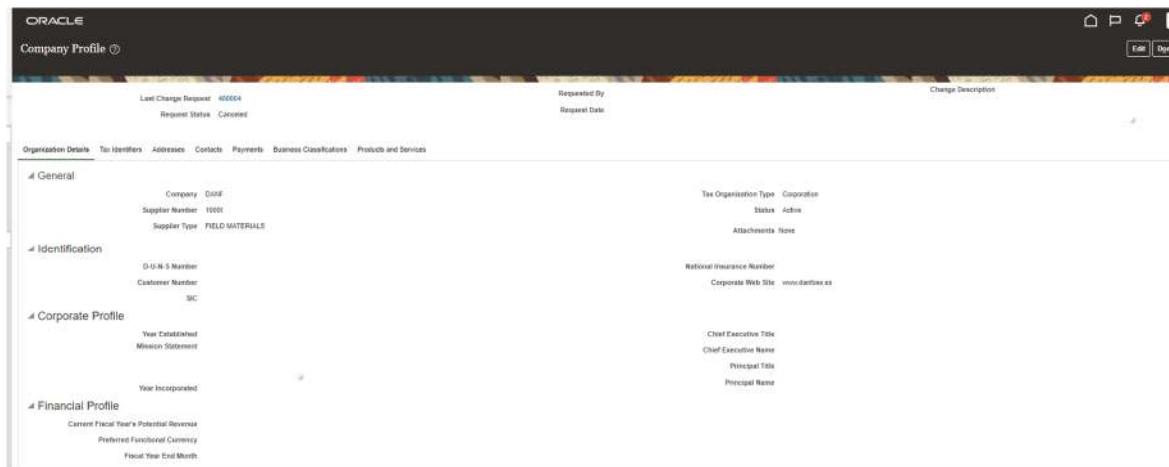


3. There are two types of notifications: FYI and Action Required. In addition to notifications in Oracle Fusion, you will also receive an email

How to view and update your contacts on Company Profile

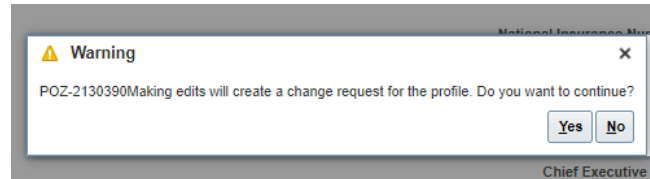
This task is required to ensure all your company contacts are setup to access the Portal:

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



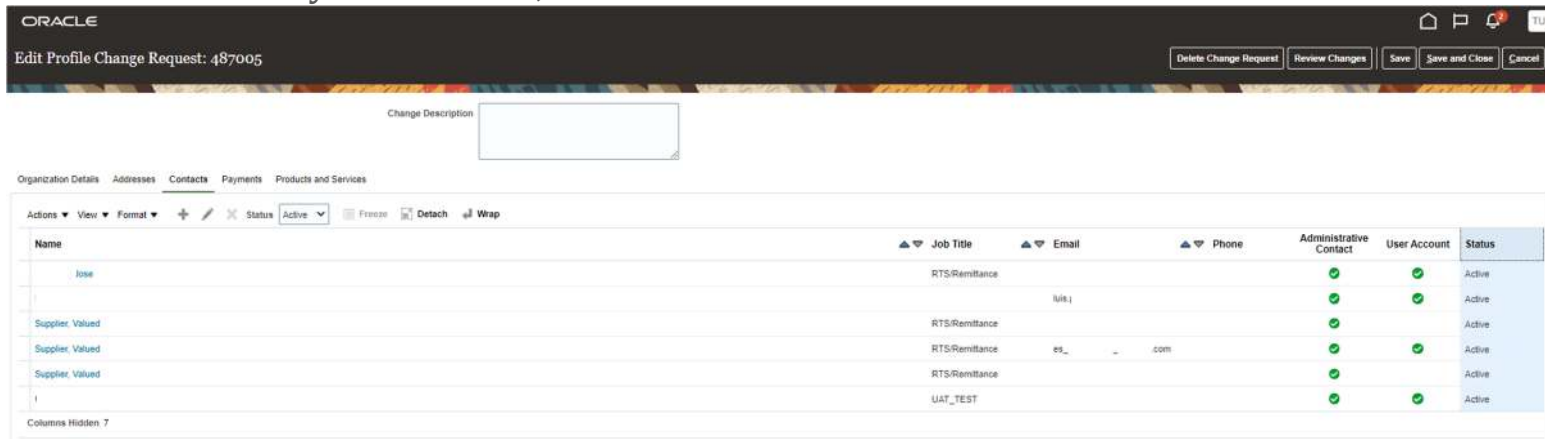
How to view and update your contacts on Company Profile

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

Delete Change Request Review Changes Save Save and Close Cancel

Change Description

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

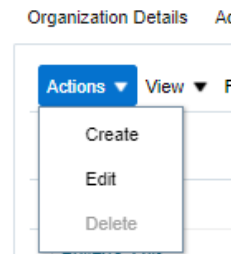
Actions View Format + - Status Active Freeze Detach Wrap

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

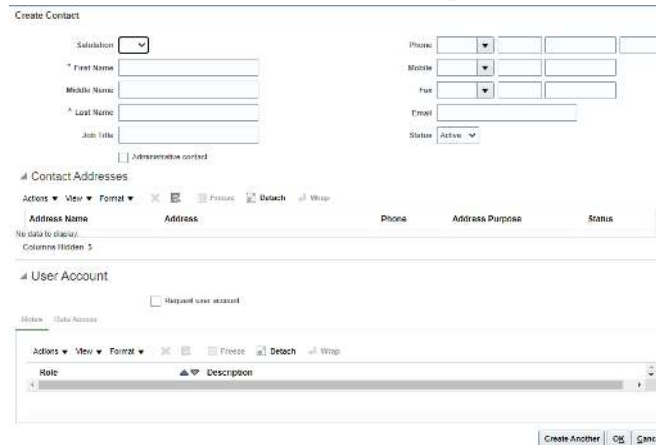
Columns Hidden 7

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 a 'Create Contact' form. The form is divided into several sections: 1. Personal Information: Fields for 'Salutation' (dropdown), 'First Name' (text), 'Middle Name' (text), 'Last Name' (text), and 'Job title' (text). 2. Administrative Access: A checkbox labeled 'Administrative contact'. 3. Contact Addresses: A table with columns 'Address', 'Phone', 'Address Purpose', and 'Status'. The table is currently empty. 4. User Account: A checkbox labeled 'Require user account'. 5. Role: A table with columns 'Role' and 'Description'. The table is currently empty. At the bottom right, there are buttons for 'Create Another', 'OK', and 'Cancel'.

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

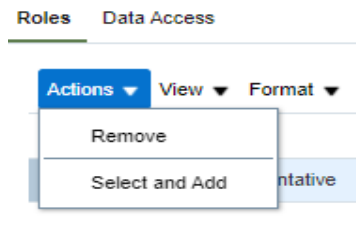
Roles Data Access

Actions v View v Format v X Freeze Detach Wrap

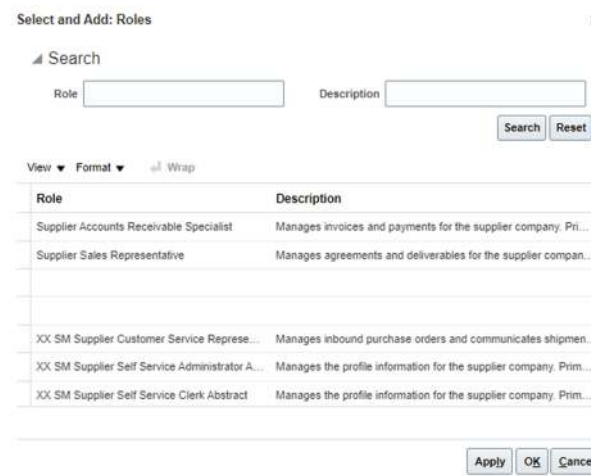
Role	Description
Supplier Sales Representative	Manages agreements and deliverables for the supplier company. Primary tasks include acknowledging or requesting changes to ...

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
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.
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.
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.
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 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

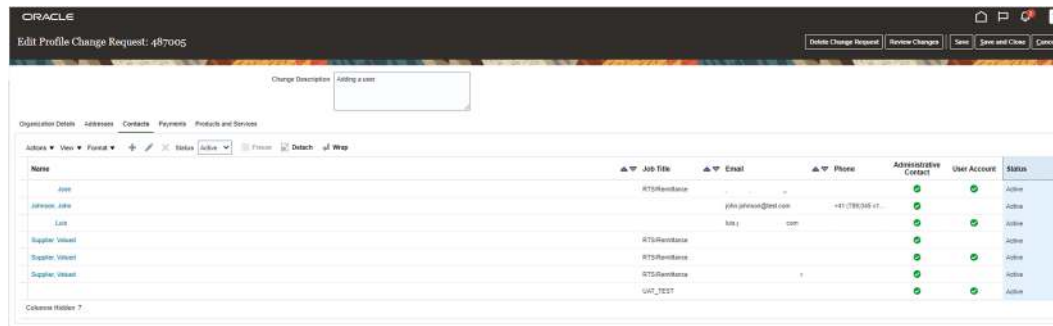
Roles Data Access

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

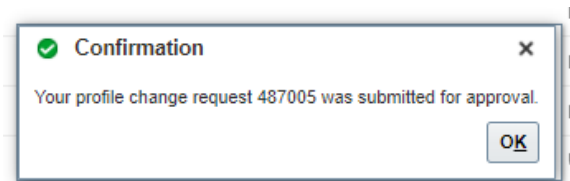
13. When you have completed your updates, click 'Review Changes'



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

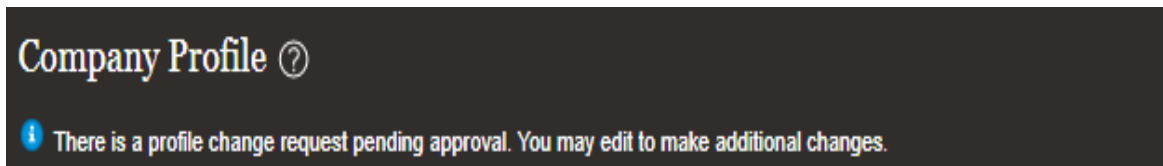
How to view and update your contacts on Company Profile

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



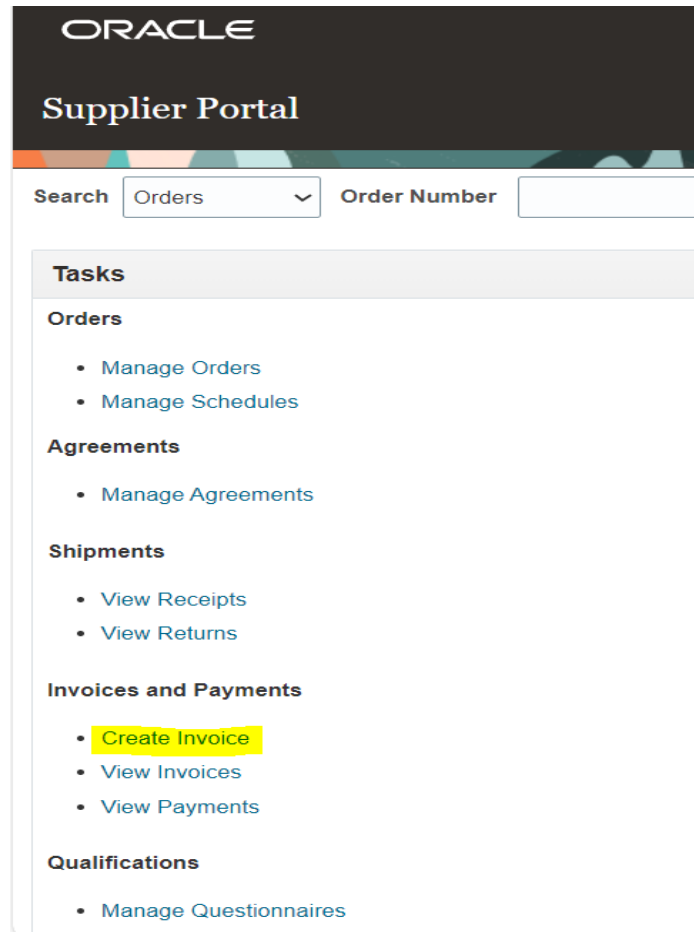
16. Your changes will be sent for an approval within JCI. Until changes are approved, this message will appear on your screen

'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:



The screenshot displays the Oracle Supplier Portal interface. At the top, the Oracle logo and 'Supplier Portal' title are visible. Below this is a search bar with a dropdown menu set to 'Orders' and a text input field labeled 'Order Number'. The main content area is titled 'Tasks' and is organized into several sections:

- Orders**
 - Manage Orders
 - Manage Schedules
- Agreements**
 - Manage Agreements
- Shipments**
 - View Receipts
 - View Returns
- Invoices and Payments**
 - **Create Invoice** (highlighted in yellow)
 - View Invoices
 - View Payments
- Qualifications**
 - Manage Questionnaires

How to create an invoice

2. You are getting this view:

ORACLE Home, Mail, 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 + Cancel Line

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

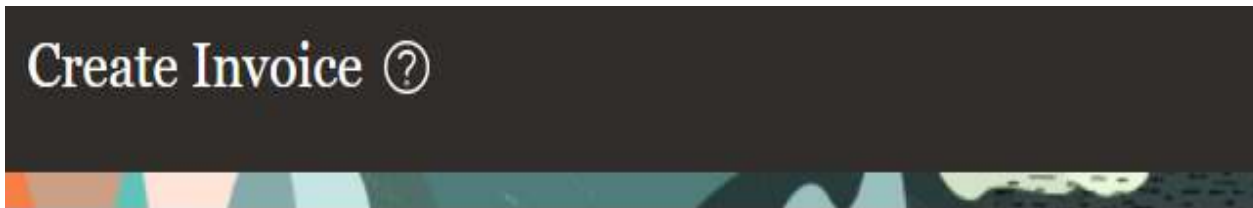
Summary Tax Lines

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 {link}
 - b) Select the Purchase Order number which you want to invoice, or you can write it directly the Purchase Order number:



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

* Identifying PO



How to create an invoice


(By selecting or writing the Purchase Order number the "Supplier Site", the address, the "Customer Taxpayer ID", and the currency are automatically filled in and you do not need to modify them.)

c) Attach your invoice in PDF here:


invoice

Supplier Tax Registration Number	<input type="text"/>	▼
Remit-to Bank Account	<input type="text"/>	▼
Unique Remittance Identifier	<input type="text"/>	
Unique Remittance Identifier Check Digit	<input type="text"/>	
Description	<input type="text"/>	
* Attachments	None +	

How to create an invoice

- d) Then put in the field “Number” the invoice number
- e) In the field “Date”, please, put the date of the invoice ; either present date or in the past
- f) In the field “Type”, it is automatically on “invoice”. If it is a credit note. Please, select credit note
- g) Add the lines which you want to invoice by clicking on the icon “  ” located as below:

Lines

View ▼ + ×  Cancel Line

* Number	* Type	* Number	* Line	* Schedule	Number
No data to display.					
Total					

How to create an invoice

h) A pop-up window appears as below (with more or less lines depending on the Purchase Orders):

Select and Add: Purchase Orders

Search Results

View Detach **Select All**

Purchase Order		Consumption Advice		Supplier Item Number	Item Description	Ship-to Location	Ordered
Number	Lin Sc	Number	Line				
PESA10024610-01	1 1			027B1120	EVM PILOT VALVE ...	Johnson Controls E...	1
PESA10024610-01	2 1			148B4184	Weld Nippel DN 6 D...	Johnson Controls E...	13
PESA10024610-01	3 1			148B5243	FIA 15 D STR FILT...	Johnson Controls E...	1
PESA10024610-01	4 1			148B5482	SCA-X 25-40 top co...	Johnson Controls E...	1
PESA10024610-01	5 1			148B5577	SVL 32 DIN BUTT ...	Johnson Controls E...	1
PESA10024610-01	6 1			148B5713	FIA 50 D STR FILT...	Johnson Controls E...	3
PESA10024610-01	7 1			148B5906	FIA 80 D STR FILT...	Johnson Controls E...	5
PESA10024610-01	8 1			148B6007	FIA 100 D STR FILT...	Johnson Controls E...	6
PESA10024610-01	9 1			148H3122	FIA-INS 15-20 100...	Johnson Controls E...	1
PESA10024610-01	1... 1			148H3150	Bolsa de filtro FIA50	Johnson Controls E...	3

Apply OK Cancel

How to create an invoice

i) Press “Select All” to select all the lines of the Purchase Order at once. Then, “Apply” and “OK”

Select and Add: Purchase Orders x

Search Results

View Detach Deselect All

Purchase Order		Consumption Advice		Supplier Item Number	Item Description	Ship-to Location	Ordered
Number	Lin Sc	Number	Line				
PESA10024610-01	1 1			027B1120	EVM PILOT VALVE ...	Johnson Controls E...	1
PESA10024610-01	2 1			148B4184	Weld Nippel DN 6 D...	Johnson Controls E...	13
PESA10024610-01	3 1			148B5243	FIA 15 D STR FILT...	Johnson Controls E...	1
PESA10024610-01	4 1			148B5482	SCA-X 25-40 top co...	Johnson Controls E...	1
PESA10024610-01	5 1			148B5577	SVL 32 DIN BUTT ...	Johnson Controls E...	1
PESA10024610-01	6 1			148B5713	FIA 50 D STR FILT...	Johnson Controls E...	3
PESA10024610-01	7 1			148B5906	FIA 80 D STR FILT...	Johnson Controls E...	8
PESA10024610-01	8 1			148B6007	FIA 100 D STR FILT...	Johnson Controls E...	6
PESA10024610-01	9 1			148H3122	FIA-INS 15-20 100...	Johnson Controls E...	1
PESA10024610-01	1... 1			148H3150	Bolsa de filtro FIA50	Johnson Controls E...	5

How to create an invoice

- Once the line(s) selected you will need to:

Lines

View + x ☰ Cancel Line

Number	* Type	Purchase Order			Consumption Advice		Supplier Item	Item Description	* Ship-to Location	* Ship-from Location	Available Quantity	Quantity	Unit Price	UOM	* Amount	Description	Intended Use	* Invoice Line Tax Amount
		* Number	* Line	* Schedule	Number	Line												
Item		PESA10...	6	1			148B5713	FIA 50 D STR FILTER HOU...	Johnson Contrc		3	3	51.72	EACH	155.16	FIA 50 D STR		

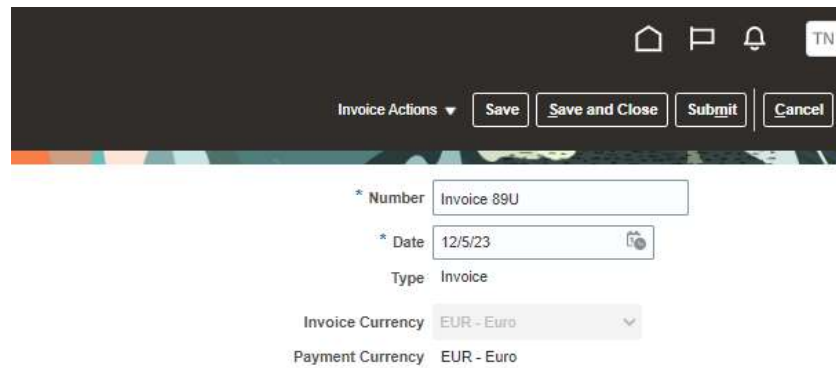
Select “Ship-from Location”, from where you have shipped your goods.

For “Intended Use” field, *you will only need to use it for “Reverse Charge” case*. Please, see “[Intended Use](#)” section for more information.

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

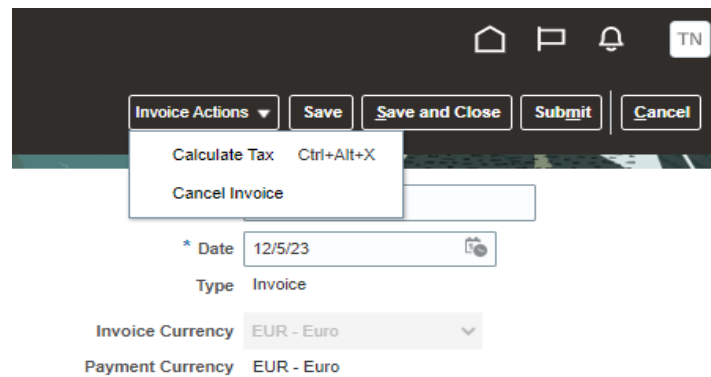
How to create an invoice

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'.

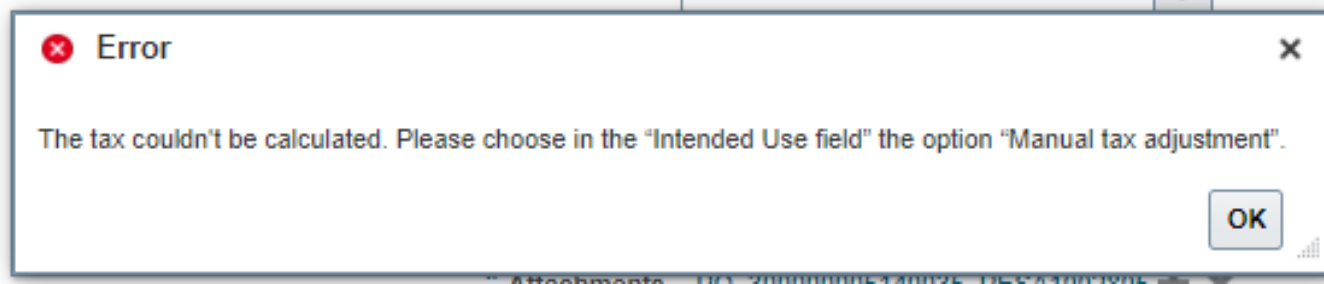
Then, click on “Calculate Tax”



The screenshot shows the same software interface as the previous one, but with the 'Invoice Actions' dropdown menu open. The menu 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 \(Intended Use – VAT related\)](#) (next page)

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

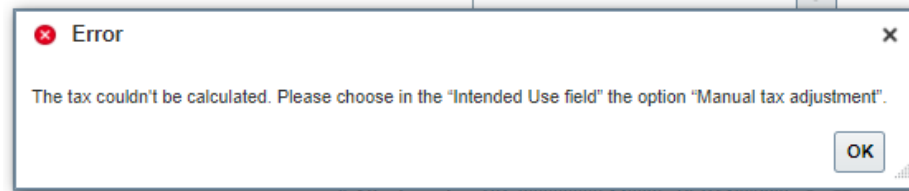
Please, be aware that "Save" and " Save and Close" buttons do not mean your invoice has been submitted. It means that it has been saved and the status is in "Incomplete". You will need to take action on that invoice otherwise, it will not be paid as our system will never, per se, receive your invoice.

Please, note once your invoice is submitted you cannot cancel it. In such case, please, write us an email to our [AP HD: contact details](#)

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.

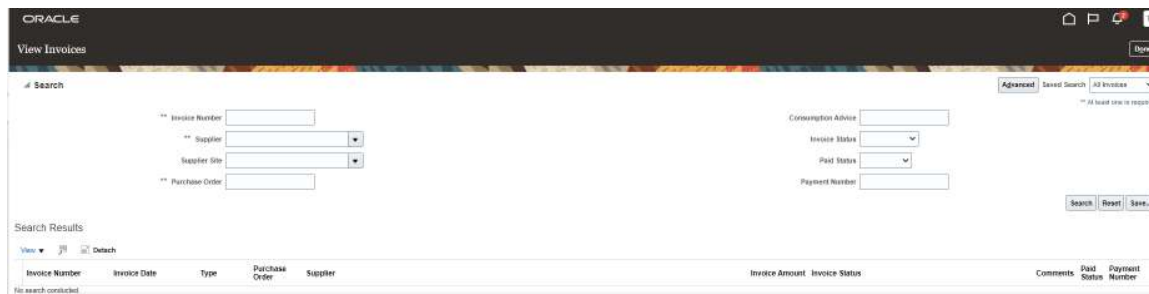
How to create an invoice (Partial invoicing)

If you want to invoice half of the Purchase Order due to Partial delivery.

The procedure is the same as normal full invoice. When you do “selecting the line(s)” you just need to select the lines you need to invoice. The rest of the lines can be invoiced later on.

How to view invoice status

1. Click on 'View invoice'

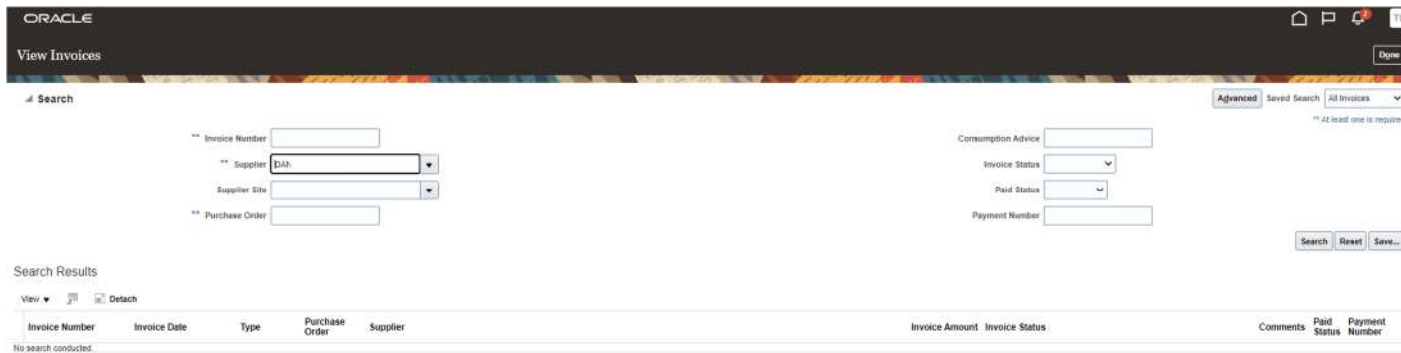


The screenshot shows the Oracle 'View Invoices' interface. At the top, there is a search bar with a 'Search' button. Below the search bar, there are several input fields for searching: 'Invoice Number', 'Supplier', 'Supplier Site', and 'Purchase Order', each marked with two asterisks (**). To the right, there are fields for 'Consumption Advice', 'Invoice Status', 'Paid Status', and 'Payment Number'. A 'Search' button is located at the bottom right of the search area. Below the search fields, there is a 'Search Results' section with a table header. The table header includes columns for 'Invoice Number', 'Invoice Date', 'Type', 'Purchase Order', 'Supplier', 'Invoice Amount', 'Invoice Status', 'Comments', 'Paid Status', and 'Payment Number'. The table body is currently empty, showing only the text 'No search conducted'.

2. To search for an invoice, populate one of the following fields marked with asterisks **

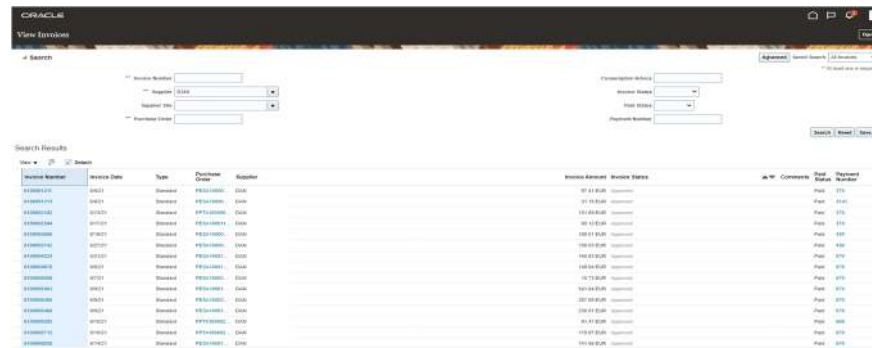
- 'Invoice number' – if you are looking for a specific invoice
- 'Supplier' – if you want to see all invoices of your company
- 'Purchase Order' – if you are looking for an invoice for a specific purchase order

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



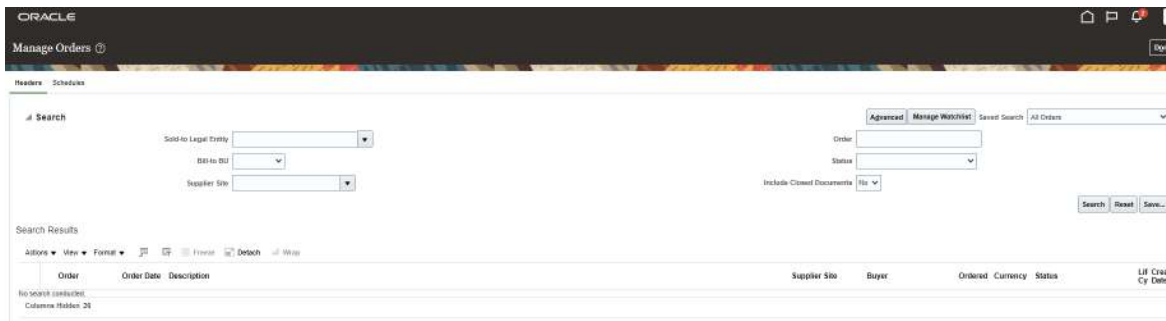
How to view invoice status

The status and their meaning

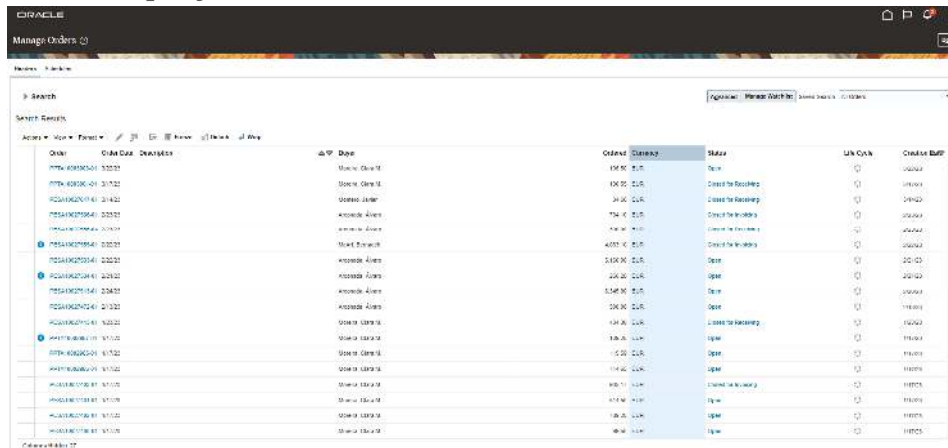
<u>Status in the Supplier Portal</u>	<u>Meaning</u>
Incomplete	You have not submitted your invoice. It is just saved. Please, review and submit, if necessary.
In process	Not yet validated
Processing	Under process
Approved	Invoice has been validated
Cancelled	Invoice has been cancelled
Paid	Invoice has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

How to view, edit and modify the Purchase Orders

1. Click on 'Manage orders'



2. Click on 'Search' button to display all orders



How to view, edit and modify the Purchase Orders

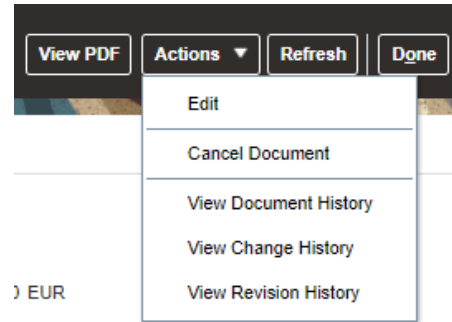
3. Navigate to an order and click on the order number to display the details

The screenshot displays the Oracle Purchasing interface for a specific purchase order. The main header shows the order number PESAI0027402-01 and navigation buttons like Acknowledge, View PDF, Actions, Refresh, and Close. The interface is divided into several sections: General, Terms and Attachments, Additional Information, and Lines. The General section includes fields for Bill-to, Order, Status, Buyer, Creation Date, Supplier, Supplier Site, Supplier Contact, Description, Source Agreement, Supplier Order, Bill-to Location, Ship-to Location, and Ordered amount. The Terms and Attachments section shows Required Acknowledgment, Payment Terms, Shipping Method, and Freight Terms. The Additional Information section includes Context Prefix, Product And Services, Procurement Group, Pricing Mechanism, Adjustment Percentage, Buyer Role, Acknowledge Purchase Order, and CDST Number. The Lines section is a table with columns for Line, Item, Description, Quantity, UOM, Base Price, Price, Ordered, and Status. It lists three items: a spare part, a download, and a tank container.

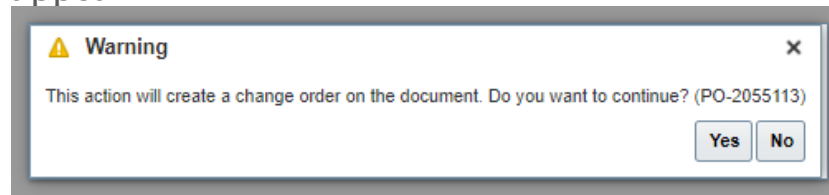
Line	Item	Description	Quantity	UOM	Base Price	Price	Ordered	Status
1	16660342	SPARE PART SIGHT GLASS LLD 335	3	EACH	85.58	256.74	256.74	Open
2	022F2288	Download 88 - EVRA 15	4	EACH	89.85	359.40	359.40	Open
3	100661330	AKS 4100041000 TANK CONTAIN D14 - 660 liter	2	EACH	86.47	172.94	172.94	Open

4. If you want to edit any value, click on 'Actions' and then select 'Edit' from the drop-down menu.

How to view, edit and modify the Purchase Orders



5. A pop-up warning message will appear



6. Click on 'Yes' to create a change order

7. To select more data to appear on 'Line', go to 'View', 'Columns' and select fields such as Requested Delivery Date, Promised Delivery Date, Source Agreement

How to view, edit and modify the Purchase Orders

The screenshot displays a software interface for viewing and editing purchase orders. A context menu is open over the 'View' dropdown in the 'Lines' section. The menu options are:

- Show All
- Attachments
- Change Status
- Change Reason
- Note to Supplier
- Source Agreement Line
- Source Agreement
- Promised Delivery Date
- Requested Delivery Date
- Location
- Supplier Configuration ID
- Currency
- Ordered
- Price
- Discount Reason
- Discount
- Discount Type
- Base Price
- UOM

The 'View' dropdown menu in the 'Lines' section includes the following options:

- About This Record
- Columns
- Freeze
- Detach
- Sort
- Reorder Columns...
- Query By Example

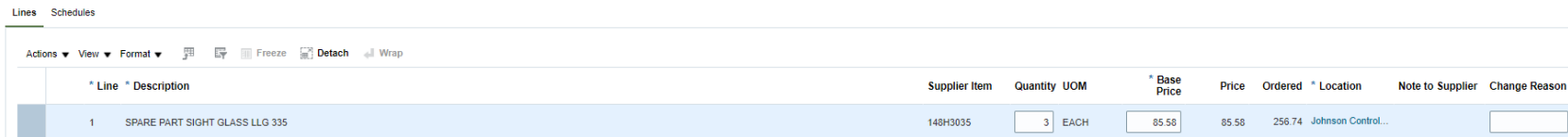
The background interface shows a purchase order record with tabs for 'Terms', 'Notes and Attachments', and 'Lines'. The 'Lines' tab is active, displaying a table with columns for 'Actions', 'View', and 'Format'. The table contains one row with the following details:

Actions	View	Format

Additional information visible in the background includes 'Additional Information', 'Context Properties', 'Pricing Mechanism', and 'Adjustment Percentage'.

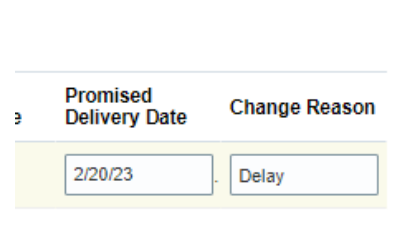
How to view, edit and modify the Purchase Orders

8. Navigate to 'Lines' section and modify the values in the fields which are opened for editing



* Line	* Description	Supplier Item	Quantity	UOM	* Base Price	Price	Ordered	* Location	Note to Supplier	Change Reason
1	SPARE PART SIGHT GLASS LLG 335	148H3035	3	EACH	85.58	85.58	256.74	Johnson Control...		

9. Navigate to 'Schedules' section and modify the Promised delivery date + give a reason in the Change reason.



Promised Delivery Date	Change Reason
2/20/23	Delay

How to view, edit and modify the Purchase Orders

10. In the field 'Change reason', add a comment/reason why you are creating this change order

Line	Description	Location	Quantity	UOM	Requested Delivery Date	Promised Delivery Date	Change Reason
1	SPARE PART SIGHT GLASS LGG 335	Johnson Control...	3	EACH	1/18/23	2/20/23	Delay
2	Overhaul kit - EVRA 15	Johnson Control...	4	EACH	1/18/23		
3	AKS 410014100U Turbo Coaxial D14 - 680 mm	Johnson Control...	2	EACH	1/18/23		

11. In the field 'Acknowledge Purchase Order', you must add some text such as 'OA' (order acknowledgement)

Please note this field 'Acknowledge Purchase Order' *must be populated* to ensure the buyer receives the change request

The screenshot shows a 'Edit Change Order' form with several sections:

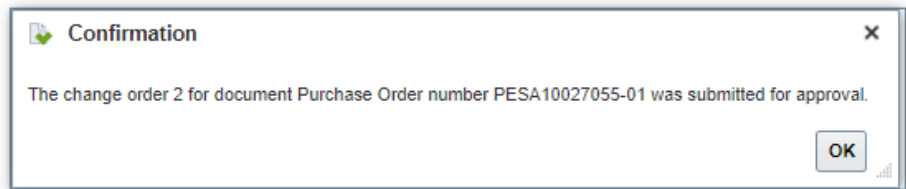
- General:** Includes fields for 'Supplier' (Johnson Control), 'Product Code', and 'Description'.
- Order Information:** Includes 'Order Number', 'Order Date', and 'Order Type'.
- Change Reason:** Includes a text area for 'Change Reason' and a dropdown for 'Change Reason Code'.
- Approval:** Includes 'Acknowledge Purchase Order' (with a dropdown set to 'OA'), 'Approved By', and 'Approved Date'.
- Table:** A table at the bottom of the form, identical to the one in step 10, showing line items with their descriptions, quantities, and delivery dates.

How to view, edit and modify the Purchase Orders

12. Navigate to the top of the screen. In the 'Description' field, add a short description of the change order that you are creating



13. Click on 'Submit' to finish the creation of the change order. Your change order will be sent for an approval

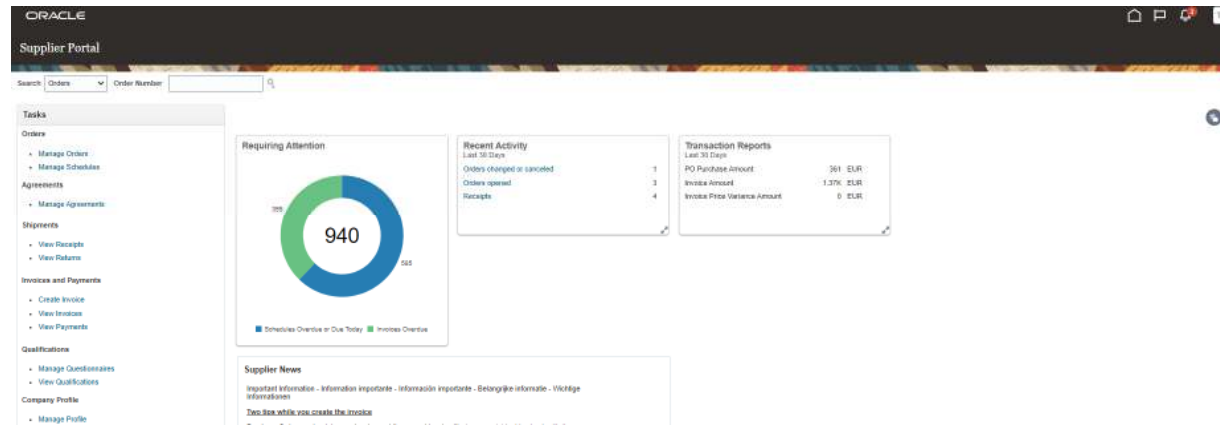


14. You will notice a pop-up window confirming that your change order was submitted for an approval

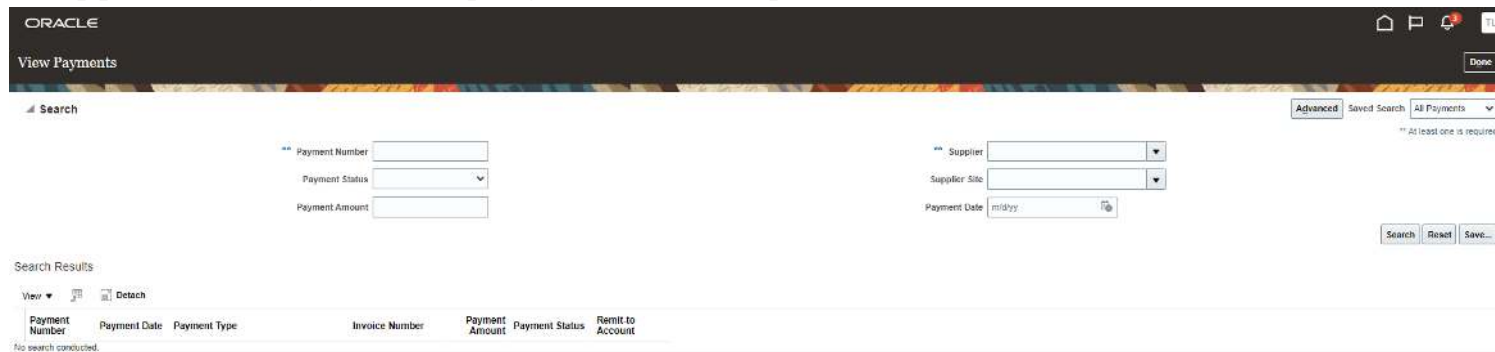
15. Once the change order has been approved, you will receive a notification via the Supplier Portal

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'

The screenshot shows the Oracle View Payments interface. At the top, there are search filters for Payment Number, Payment Status, Payment Amount, Recipient, Recipient Site, and Payment Date. Below the filters, the 'Search Results' section displays a table with the following columns: Payment Number, Payment Date, Payment Type, Invoice Number, Payment Amount, Payment Status, and Remit-to Account.

Payment Number	Payment Date	Payment Type	Invoice Number	Payment Amount	Payment Status	Remit-to Account
8648	11/24/22	Payment Process Request	6100147886	237.32 EUR	Negotiable	890200001
8650	11/24/22	Payment Process Request	6100147886	622,548.00	Negotiable	890200001
8280	11/24/22	Payment Process Request	6100147886	75,788.00	Cleared	890200001
7888	11/24/22	Payment Process Request	6100147886	485.83 EUR	Cleared	890200001
7887	11/24/22	Payment Process Request	6100147886	82,842.00	Cleared	890200001
7873	11/24/22	Payment Process Request	6100147886	652,826.54	Cleared	890200001
7995	11/24/22	Payment Process Request	6100147886	118.95 EUR	Cleared	890200001
7889	11/24/22	Payment Process Request	6100147886	71,885.00	Cleared	890200001
8651	11/24/22	Payment Process Request	6100147886	50,287.02	Cleared	890200001
8188	11/24/22	Payment Process Request	6100147886	26.24 EUR	Cleared	890200001
8170	11/24/22	Payment Process Request	6100147886	77,852.07	Cleared	890200001
8660	11/24/22	Payment Process Request	6100147886	290.51 EUR	Cleared	890200001
8661	11/24/22	Payment Process Request	6100147886	70,488.07	Cleared	890200001
8277	11/24/22	Payment Process Request	6100147886	32.41 EUR	Cleared	890200001
8278	11/24/22	Payment Process Request	6100147886	82,862.75	Cleared	890200001

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

The screenshot shows the Oracle Payment: 8648 details page. It displays the following information:

- Business Unit: CH 1000 BU
- Payee: DAN -
- Payee Site: ALCOB
- Address:
- Payment Status: Negotiable
- Payment Amount: 237.32 EUR
- Payment Date: 11/24/22
- Payment Type: Payment Process Request
- Remit-to Account: 030
- Payment Document:

Below the details, there is a section for 'Paid Invoices' with the following table:

Number	Invoice Date	Type	Purchase Order	Receipt	Consumption Advice	Paid Amount	Invoice Amount	Invoice Status	Due Date	Paid Status
6100147886	9/5/22	Standard	PPTA10001110-01			237.32 EUR	237.32 EUR	Workflow ...	12/5/22	Fully paid

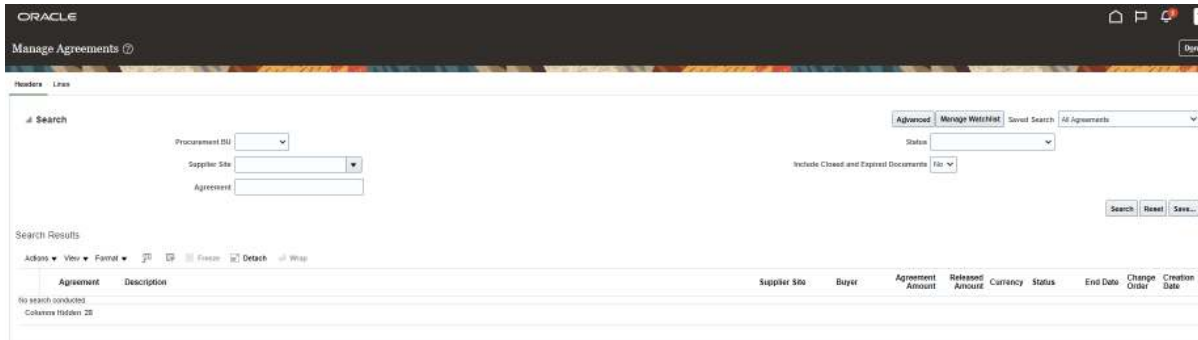
How to view payment status

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

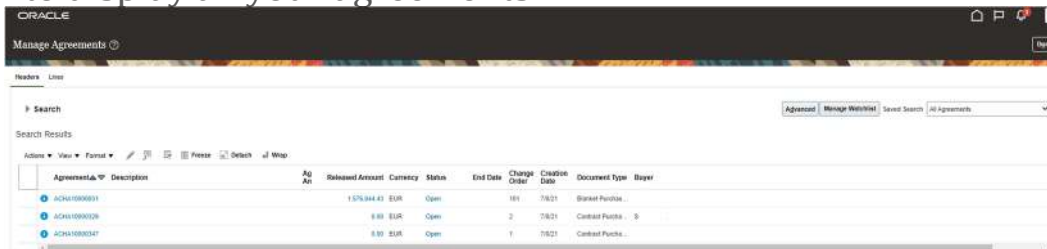
How to view and edit agreements

The agreements contain information about the products, prices, payment terms, and Incoterms that you have agreed to with JCI.

1. Click on 'Manage Agreements'



2. In the field 'Agreement', enter an agreement number and click on 'Search'. If you do not know the agreement number, click on 'Search' to display all your agreements



How to view and edit agreements

3. If you want to make any changes to your agreement, click on 'Actions' and then select 'Edit' from the drop-down menu

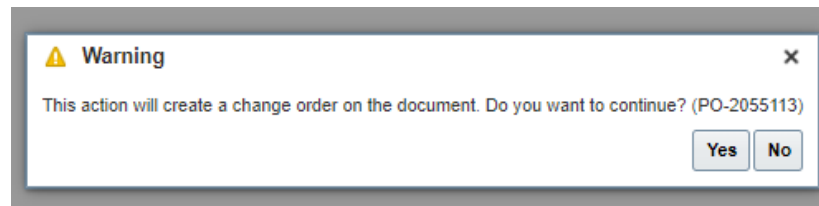
The screenshot shows the Oracle Procurement Agreement interface. At the top, it displays the agreement ID: AC1410000031. Below this, there are several sections: 'Main' with fields for Agreement ID, Supplier, Start Date, End Date, Status, Supplier Contract, Supplier Agreement, Agreement Amount, Minimum Order Amount, Release Amount, and Description; 'Terms and Subterms' with fields for Request Acknowledgment, Payment Terms, Billing Method, Freight Terms, and FOB; and 'LINES' which is a table of line items.

Line Item	Description	Category Name	UOM	Price	Released Amount	Expiration Date	Status	Details
1	882 27x 26x 16mm 902	HUGERBALLY	SACP	179.00	0.00	31/03/23	Open	
2	882 27x 26x 16mm 902	HUGERBALLY	SACP	179.00	0.00	31/03/23	Contract	
3	882 27x 26x 16mm 902/005	HUGERBALLY	SACP	36.10	0.00	31/03/23	Open	
4	0778 SERVICE THERMO2517 160.1	CONTR01304	SACP	60.00	0.00	31/03/23	Open	
5	0778 SERVICE THERMO2517 160.2	CONTR01304	SACP	24.00	240.00	31/03/23	Open	
6	0778 SERVICE THERMO2517 160.3	CONTR01304	SACP	28.00	0.00	31/03/23	Open	

A close-up of the 'Actions' dropdown menu from the Oracle interface. The menu is open, showing several options: 'Edit', 'Acknowledge', 'Cancel Document', 'View Document History', 'View Change History', and 'View Revision History'. The 'Edit' option is highlighted at the top of the list.

How to view and edit agreements

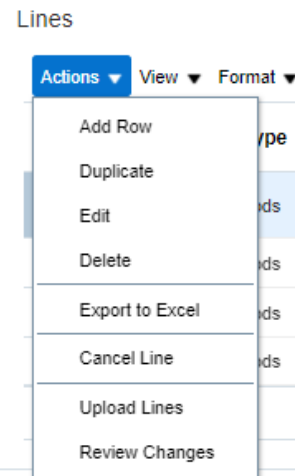
4. A pop-up warning message may appear indicating that your action will create a change order against the agreement document



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

6. Fill in all fields that have been opened for editing

7. If you wish to edit any other line, select the line and click on the 'Pencil' icon or Actions and edit



How to view and edit agreements

8. If you do not wish to submit your changes, click on 'Cancel'
9. If you want to save your changes, click on 'Save' button
10. Once you have finished making your changes, click on 'Submit'. Please note, that once you click on 'Submit', changes can no longer be made. Ensure you complete the Description and Change Reason fields

Lines

Actions ▾ View ▾ Format ▾ + [Icons] Freeze [Icon] Detach [Icon] Wrap [Icon]

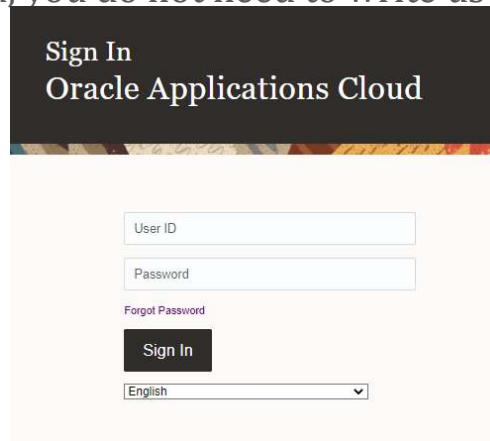
* Line	* Type	Edit	Item	* Description	* Category Name	Supplier Item	UOM	* Price	Expiration Date	Change Reason
1	Goods	[Pencil]	100038653	A121 Alarm Sounder Red 24 V DC	FIRE DETECTION/FI	A141DC24	EACH	300.00	3/31/24	As agreed
2	Goods	[Pencil]	100034785	Flash Lamp EX Red	ELECTRONIC COMP	98FHAD1...	EACH	365.68	3/31/23	
3	Goods	[Pencil]	100041133	Electronic Multitone Siren 24 – 260V AC and 60 – 260V DC RAL 3000 Red	SECURITY - INTRUSI	A105NAC...	EACH	168.50	3/31/23	
4	Goods	[Pencil]	100039586	Flash Lamp Ex Green	ELECTRONIC COMP	98FHAD1...	EACH	365.68	3/31/23	

Columns Hidden 13

11. You will notice a pop-up window confirming that your change order was submitted for an approval

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

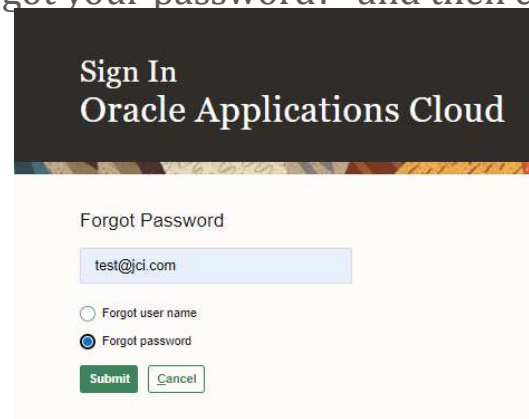
Password

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

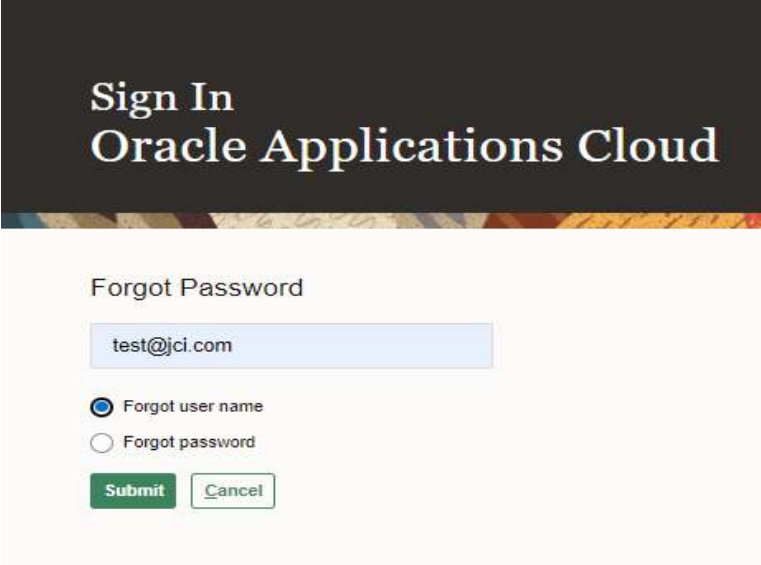
Forgot password

Submit Cancel

Forgot password and/or username

3. 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?"

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



The screenshot shows the 'Sign In Oracle Applications Cloud' interface. Under the 'Forgot Password' section, there is a text input field containing 'test@jci.com'. Below the input field, there are two radio button options: 'Forgot user name' (which is selected) and 'Forgot password'. At the bottom of the form, there are two buttons: a green 'Submit' button and a white 'Cancel' button.

5. 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 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:

ICI-EMEA-PROCURECO-SUPPLIERCOMMS@ICI.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.**