

Quick Reference Guide (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 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.

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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.

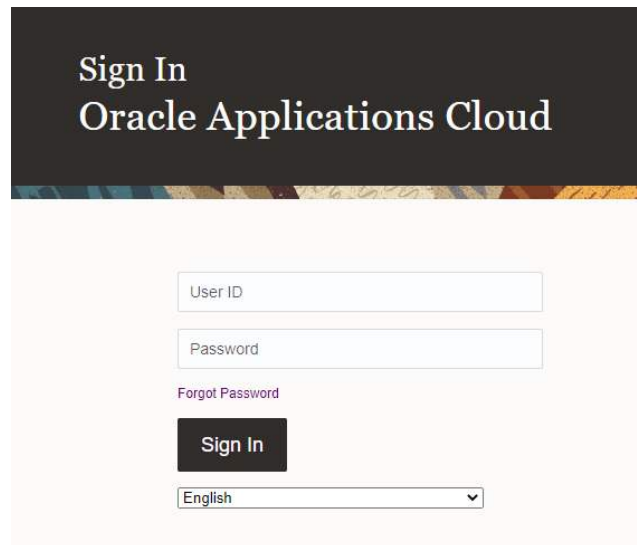
Your access level impacts the functionality and screens you see in the system. Sometime the screens you see may change slightly or differ to the training materials due to new Oracle releases or your access levels.

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".

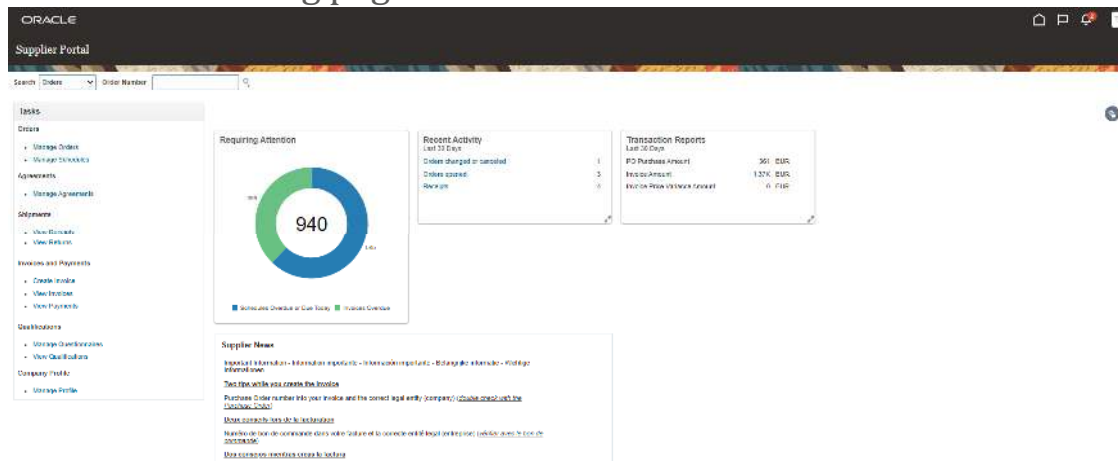
2. Input user ID and password as provided in a Welcome notification you received by email

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



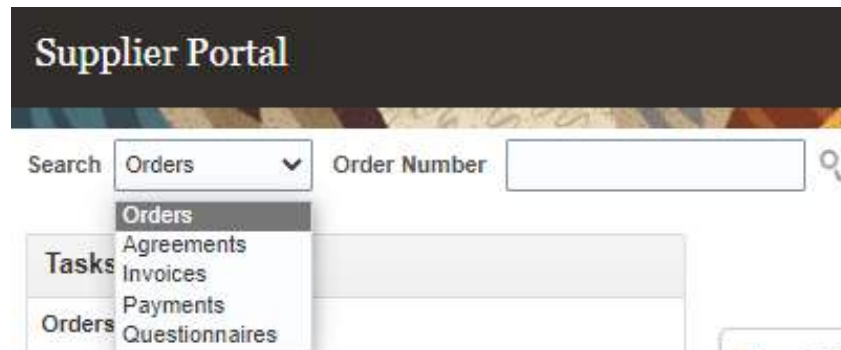
How access and navigate the Supplier Portal

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



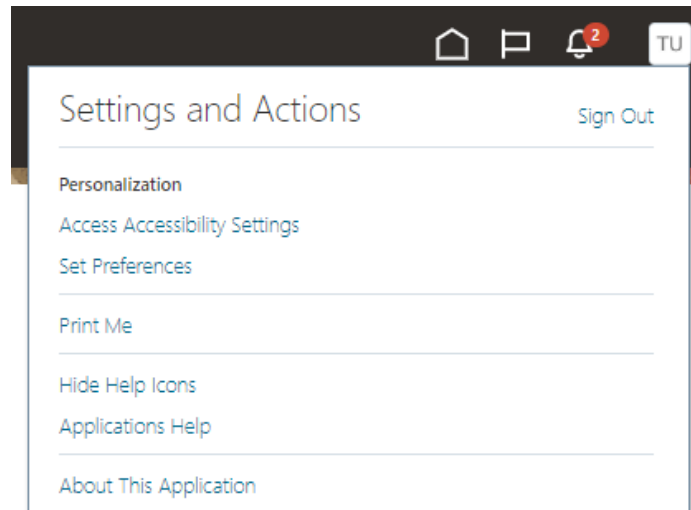
Settings and Preferences

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

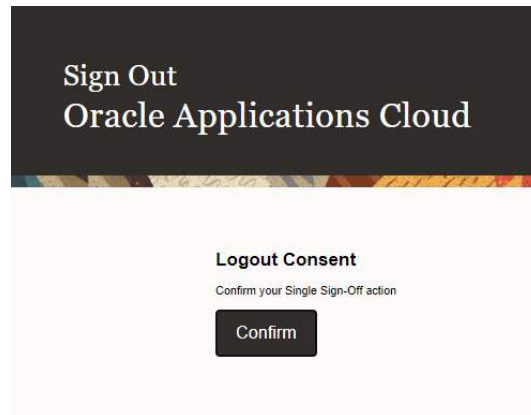


2. Then click on « Sign Out »



Settings and Preferences

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



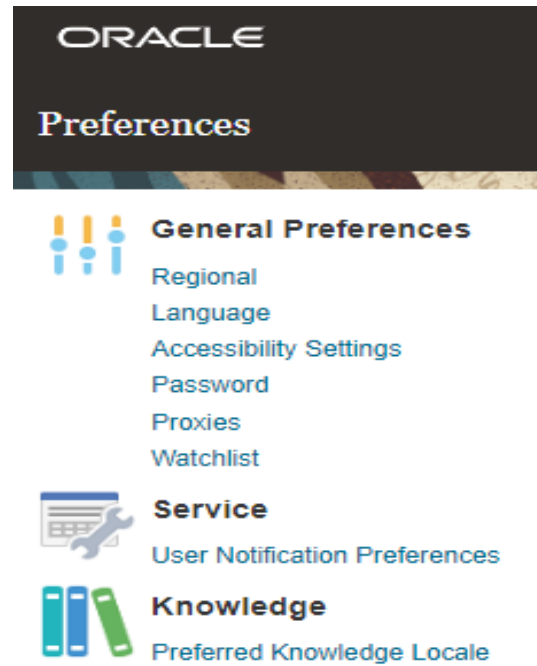
Setting General Preferences

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 :



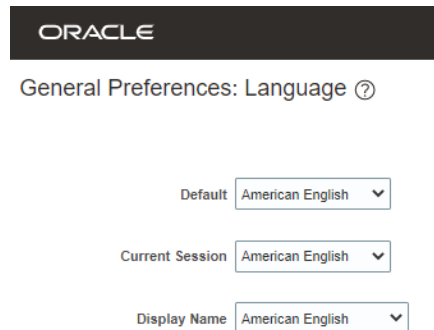
Settings and Preferences

2. Then click on 'Set Preferences'



Settings and Preferences

3. Then click on 'Language'



The screenshot shows the Oracle 'General Preferences: Language' settings page. At the top, there is a black header with the word 'ORACLE' in white. Below the header, the title 'General Preferences: Language' is displayed with a help icon. There are three dropdown menus, each with 'American English' selected and a downward arrow:


- 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

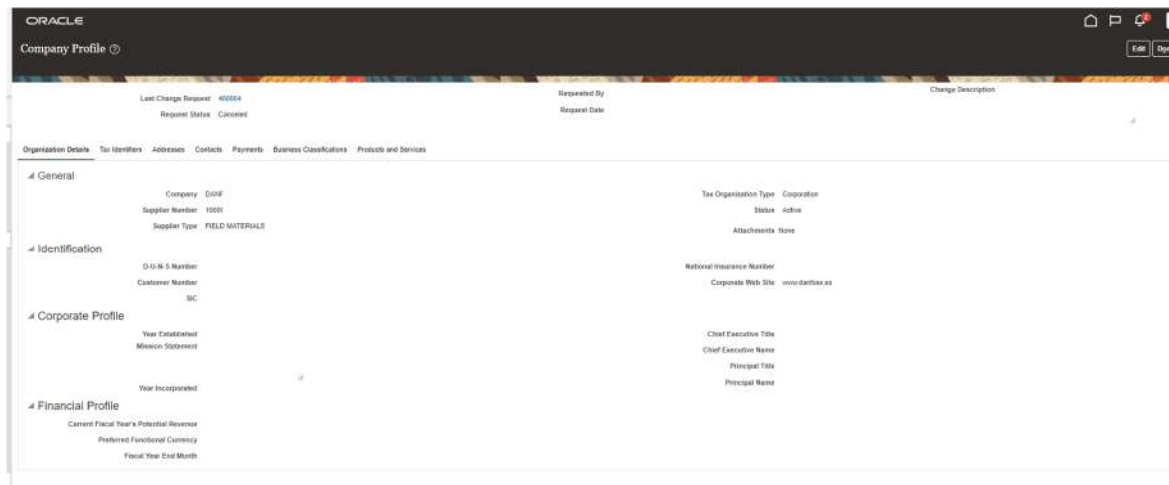


3. There are two types of notifications: FYI and Action Required. In addition to notifications in Oracle Fusion, you will also receive an email

How to view and update your contacts on Company Profile

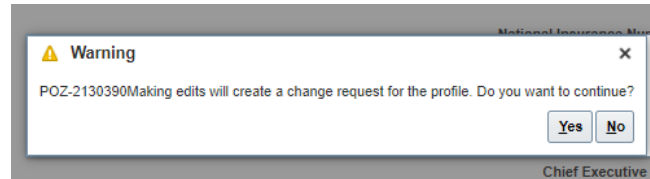
This task is required to ensure all your company contacts are setup to access the Portal:

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



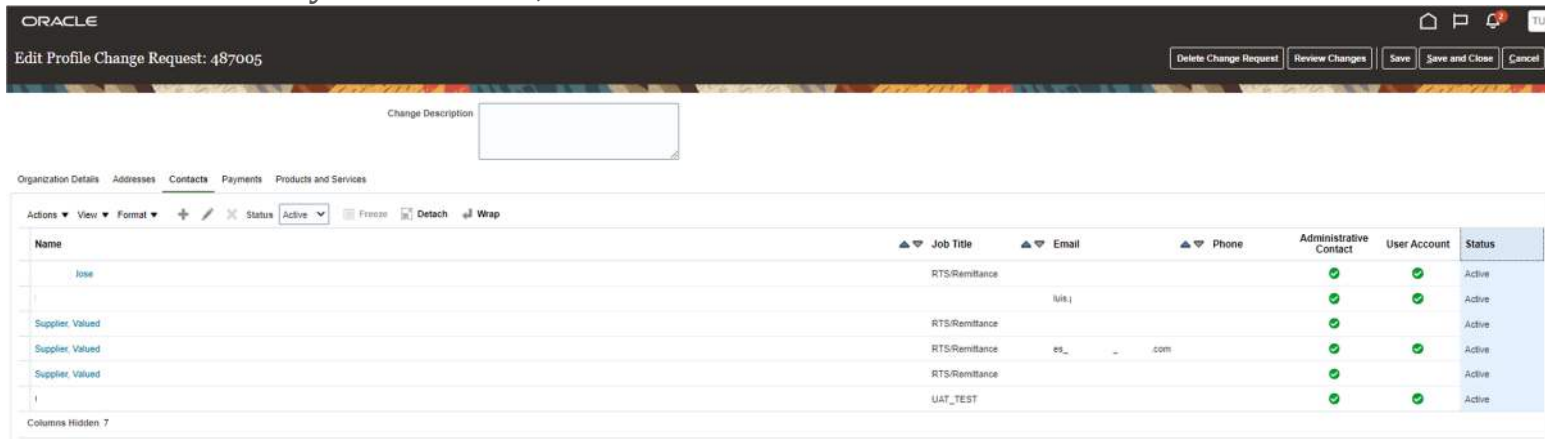
How to view and update your contacts on Company Profile

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

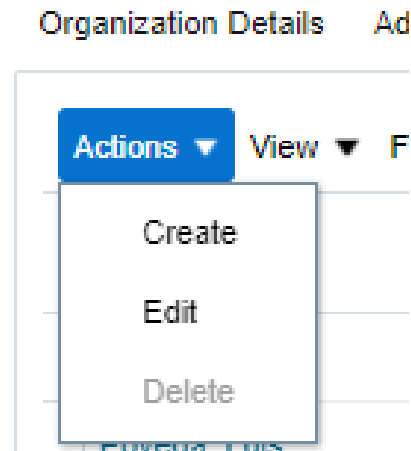
Actions View Format + - Status Active Freeze Detach Wrap

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



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

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

Create Contact ✕

Salutation

* First Name

Middle Name

* Last Name

Job Title

Administrative contact

Phone

Mobile

Fax

Email

Status

Contact Addresses

Actions View Format Freeze Detach Wrap

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

User Account

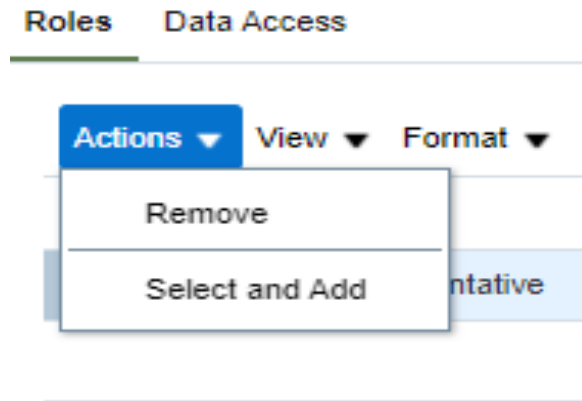
E-mail is required when requesting a user account

Roles Data Access

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

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 ✕

Salutation

* First Name

Middle Name

* Last Name

Job Title

Administrative contact

Phone

Mobile

Fax

Email

Status

Contact Addresses

Actions View Format Freeze Detach Wrap

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

User Account

Request user account

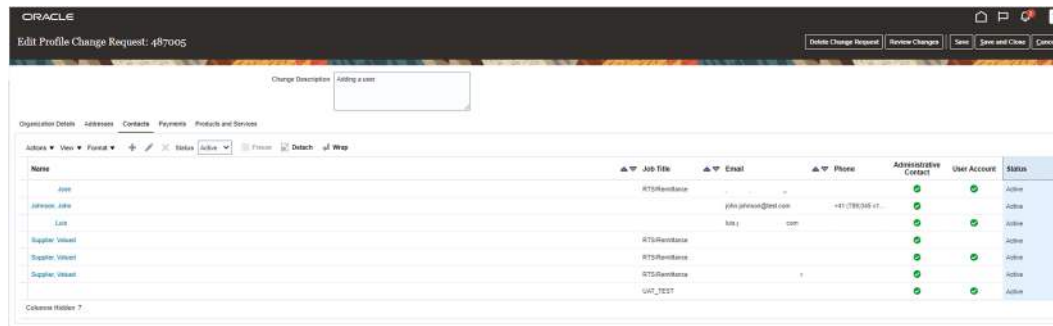
Roles Data Access

Actions View Format 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

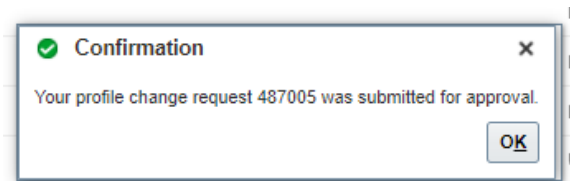
13. When you have completed your updates, click 'Review Changes'



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

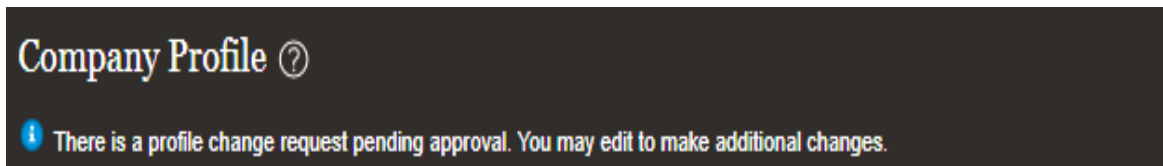
How to view and update your contacts on Company Profile

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



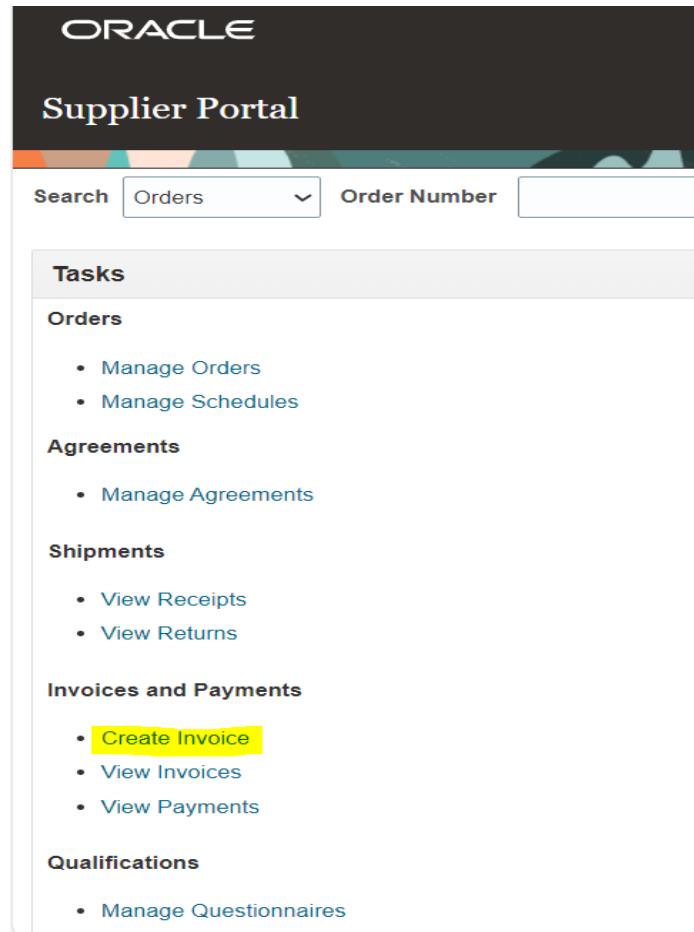
16. Your changes will be sent for an approval within JCI. Until changes are approved, this message will appear on your screen

'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:



The screenshot displays the Oracle Supplier Portal interface. At the top, the Oracle logo is visible on a dark background, followed by the text 'Supplier Portal'. 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 contains several categories of actions:

- Orders**
 - Manage Orders
 - Manage Schedules
- Agreements**
 - Manage Agreements
- Shipments**
 - View Receipts
 - View Returns
- Invoices and Payments**
 - Create Invoice
 - View Invoices
 - View Payments
- Qualifications**
 - Manage Questionnaires

The 'Create Invoice' option is highlighted with a yellow background.

How to create an invoice

2. You are getting this view:

ORACLE Home, Print, Notifications, 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

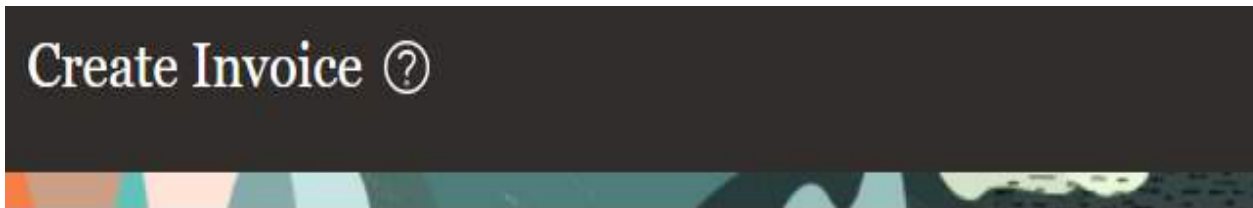
* Number	* Type	* Ship-to Location	Ship-from Location	* Amount	Description	Intended Use	* Tax Contr Amount
No data to display.							

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:



Supplier Tax Registration Number

Remit-to Bank Account


Unique Remittance Identifier

Unique Remittance Identifier Check Digit


Description

* 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	Sci	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		

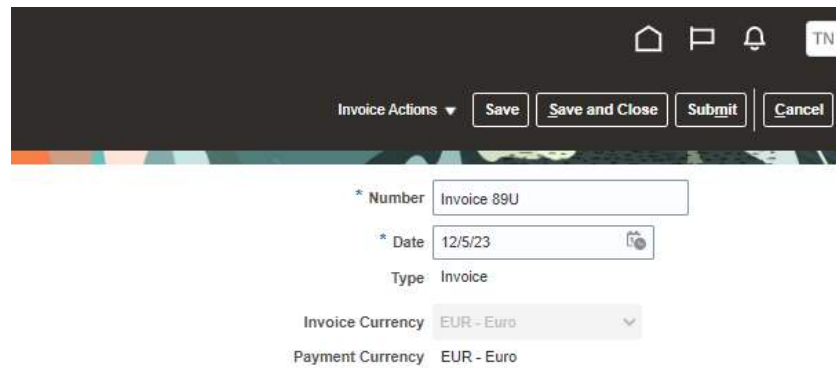
Select “Ship-from Location”, from where you have shipped your goods.

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.

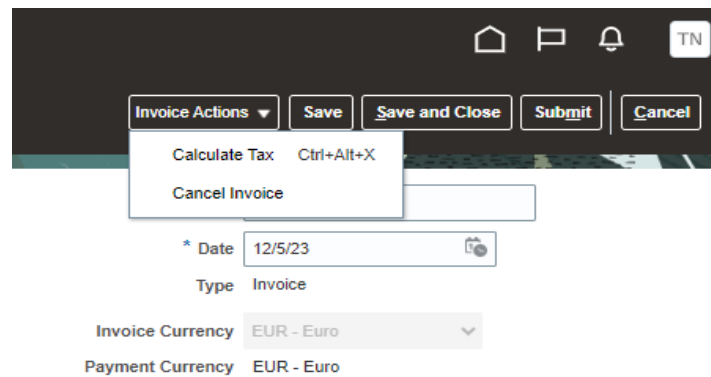
How to create an invoice

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'.

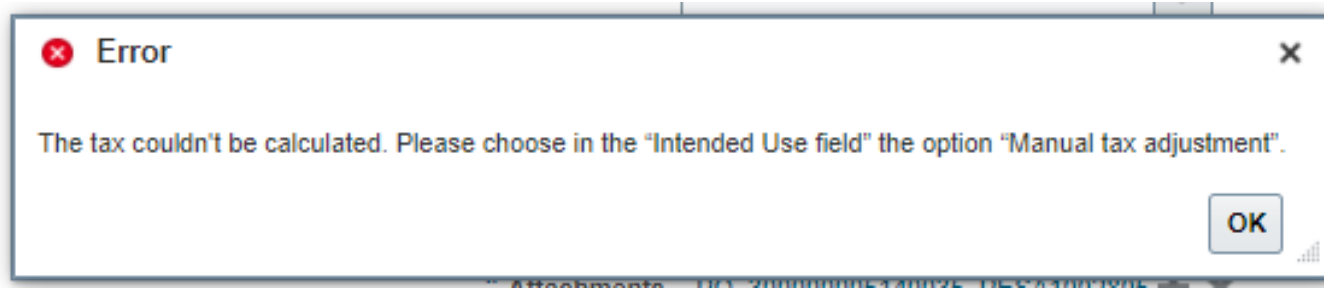
Then, click on “Calculate Tax”



The screenshot shows the same software interface as 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 background elements, including the buttons and input fields, are visible but slightly dimmed.

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.

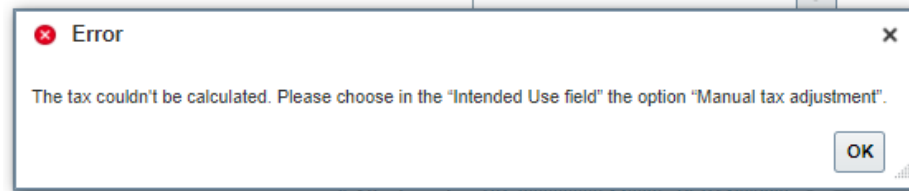
Please, be aware that "Save" and " Save and Close" buttons do not mean your invoice has been submitted. It means that it has been saved and the status is in "Incomplete". You will need to take action on that invoice otherwise, it will not be paid as our system will never, per se, receive your invoice.

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 filtering invoices: 'Invoice Number', 'Supplier', 'Supplier Site', and 'Purchase Order', each marked with two asterisks (**). To the right, there are dropdown menus for 'Consumption Advice', 'Invoice Status', and 'Paid Status', along with a 'Payment Number' input field. A 'Search' button is located at the bottom right of the search area. Below the search area, 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 results'.

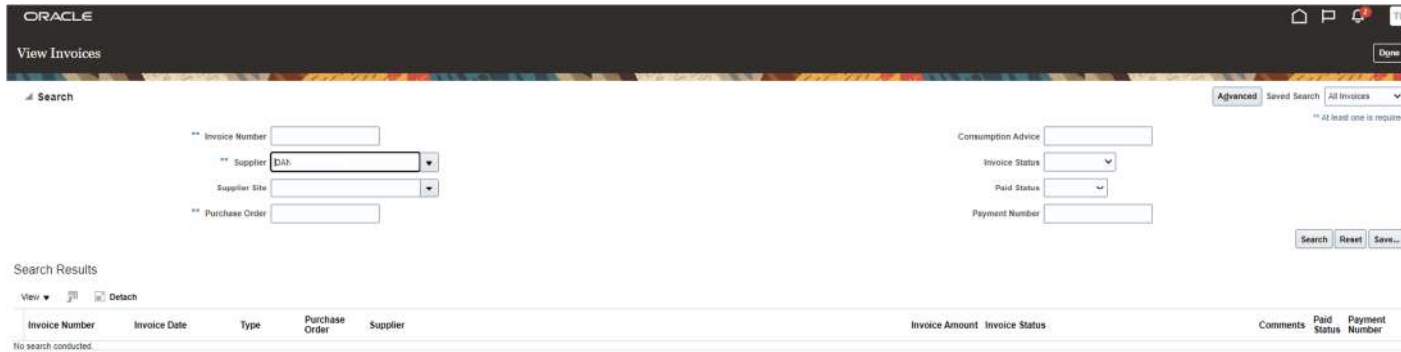
2. To search for an invoice, populate one of the following fields marked with asterisks **

a. 'Invoice number' – if you are looking for a specific invoice

b. 'Supplier' – if you want to see all invoices of your company

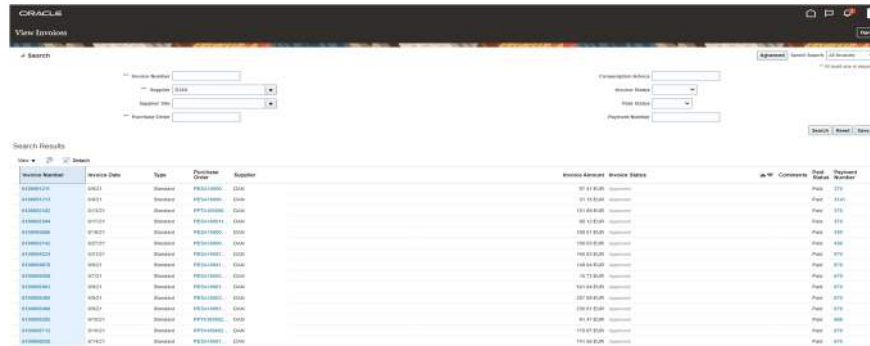
c. 'Purchase Order' – if you are looking for an invoice for a specific purchase order

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



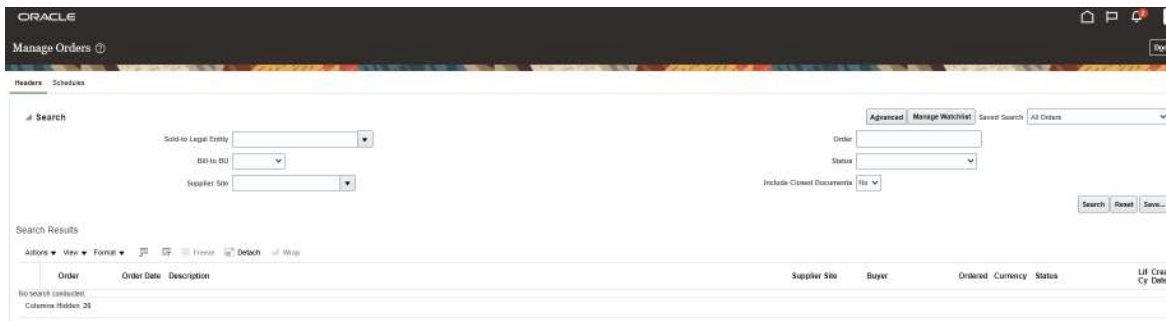
How to view invoice status

The status and their meaning

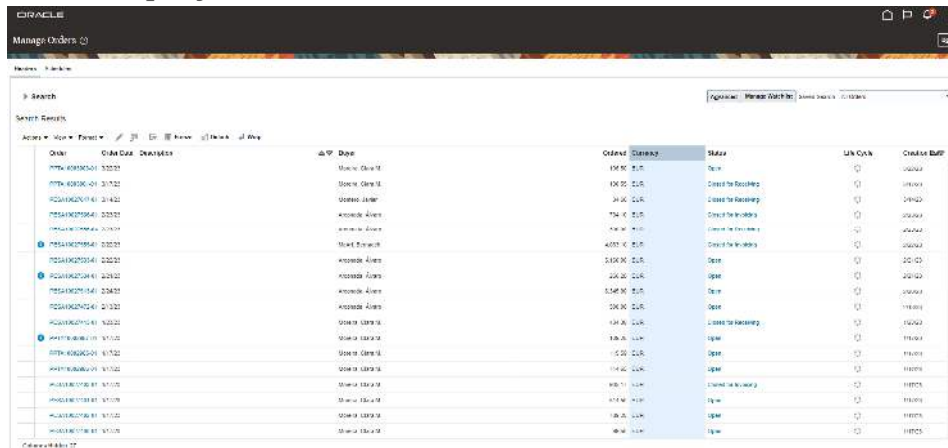
<u>Status in the Supplier Portal</u>	<u>Meaning</u>
Incomplete	You have not submitted your invoice. It is just saved. Please, review and submit, if necessary.
In process	Not yet validated
Processing	Under process
Approved	Invoice has been validated
Cancelled	Invoice has been cancelled
Paid	Invoice has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

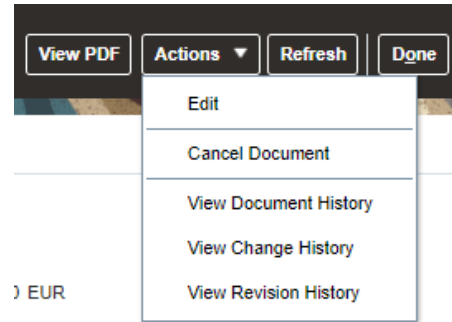
3. Navigate to an order and click on the order number to display the details

The screenshot displays the Oracle Purchasing interface for a specific purchase order. The main header shows the order number PESAI0027402-01 and navigation options 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 details such as Bill-to and Ship-to locations, Supplier (ALCOBE), and Order status (Open). The Terms section shows Required Acknowledgment (None) and Payment Terms (75 NPR). The Additional Information section includes Context (CH 1990 BU) and Product and Services. The Lines section contains a table with 3 items:

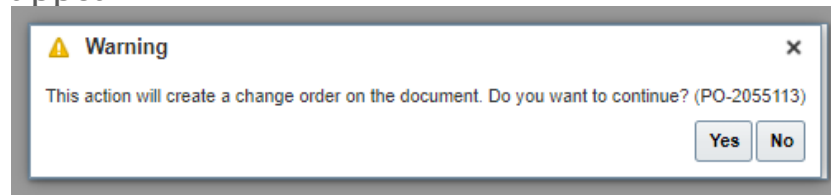
Line	Item	Description	Quantity	UDM	Base Price	Price	Ordered	Status
1	10000142	SPARE PART SIGHT GLASS LLD 335	3	EACH	85.58	256.74	256.74	Open
2	022P2208	Overhaul kit - EVRA 15	4	EACH	89.85	359.40	359.40	Open
3	10000130	AKS-4100041000 TANK COVER D14 - 660 mm	2	EACH	86.47	172.94	172.94	Open

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 managing purchase orders. A 'View' dropdown menu is open, showing a list of fields with checkboxes indicating their visibility. The 'View' menu is also open, showing options like 'Columns', 'Sort', and 'Reorder Columns...'. The background shows a table with purchase order details.

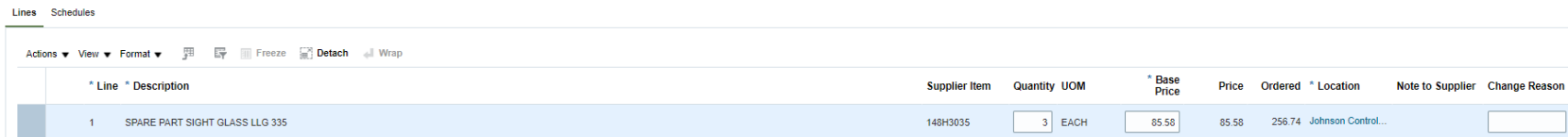
Field	Visibility
Show All	Selected
Attachments	Not Selected
Change Status	Not Selected
Change Reason	Selected
Note to Supplier	Selected
Source Agreement Line	Not Selected
Source Agreement	Not Selected
Promised Delivery Date	Not Selected
Requested Delivery Date	Not Selected
Location	Not Selected
Supplier Configuration ID	Not Selected
Currency	Not Selected
Ordered	Selected
Price	Selected
Discount Reason	Not Selected
Discount	Not Selected
Discount Type	Not Selected
Base Price	Not Selected
UOM	Selected

Background Table Data:

Order	Status	Buyer	Creation Date	Terms	Notes and Attachments
					Note to Supplier
Additional Information					
					Context Properties
					Proration
					Pricing Mechanism
					Adjustment Percentage
Lines Schedules					
					Actions View Format
					Columns H
					Wrap
					GLASS LLG 335
					15
					Coaxial D14 - 680 mm

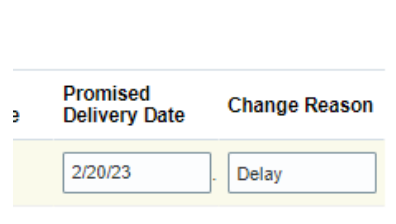
How to view, edit and modify the Purchase Orders

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:

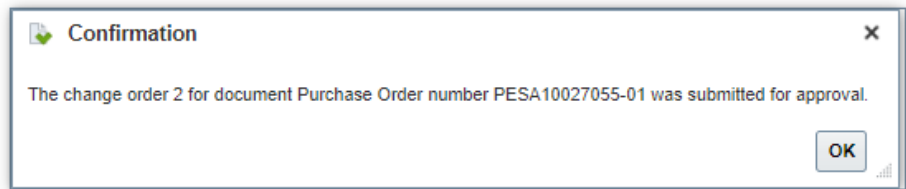
- General:** Includes fields for 'Supplier' (Johnson Control), 'Product Code', and 'Description'.
- Order Information:** Includes 'Order Number', 'Order Date', and 'Order Status'.
- Change Reason:** A text area for providing details on why the change is needed.
- Approval:** Fields for 'Requested By', 'Approved By', and 'Approval 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

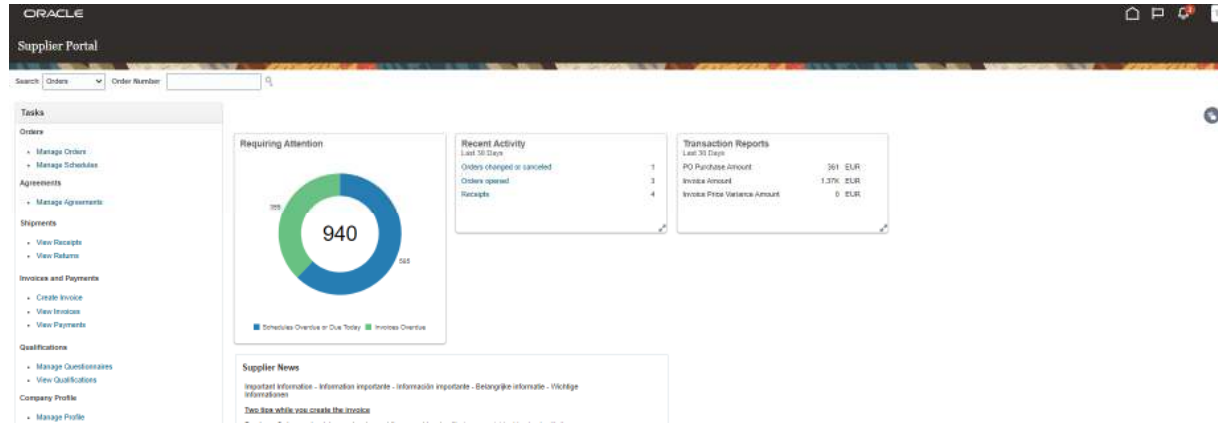


14. You will notice a pop-up window confirming that your change order was submitted for an approval

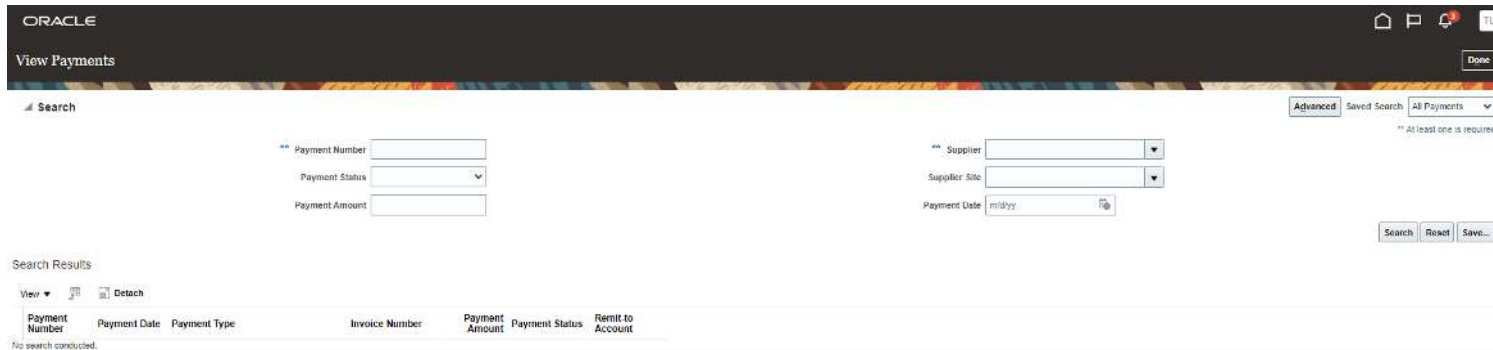
15. Once the change order has been approved, you will receive a notification via the Supplier Portal

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'

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
8649	11/24/22	Payment Process Request	6100147886	622,546.66	Negotiable	890200001
8286	11/24/22	Payment Process Request	6100147886	75,788.94	Valid	890200001
7888	11/24/22	Payment Process Request	6100147886	465.83 EUR	Cleared	890200001
7887	11/24/22	Payment Process Request	6100147886	82,842.28	Cleared	890200001
7873	11/24/22	Payment Process Request	6100147886	652,626.54	Cleared	890200001
7865	11/24/22	Payment Process Request	6100147886	118.95 EUR	Cleared	890200001
7864	11/24/22	Payment Process Request	6100147886	71,848.86	Cleared	890200001
8651	11/24/22	Payment Process Request	6100147886	92,287.02	Cleared	890200001
8188	11/24/22	Payment Process Request	6100147886	26.24 EUR	Cleared	890200001
8170	11/24/22	Payment Process Request	6100147886	77,852.27	Cleared	890200001
8660	11/24/22	Payment Process Request	6100147886	290.51 EUR	Cleared	890200001
8661	11/24/22	Payment Process Request	6100147886	70,448.27	Cleared	890200001
8277	11/24/22	Payment Process Request	6100147886	32.41 EUR	Cleared	890200001
8278	11/24/22	Payment Process Request	6100147886	82,842.75	Cleared	890200001

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

Payment: 8648

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:

Paid Invoices

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 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

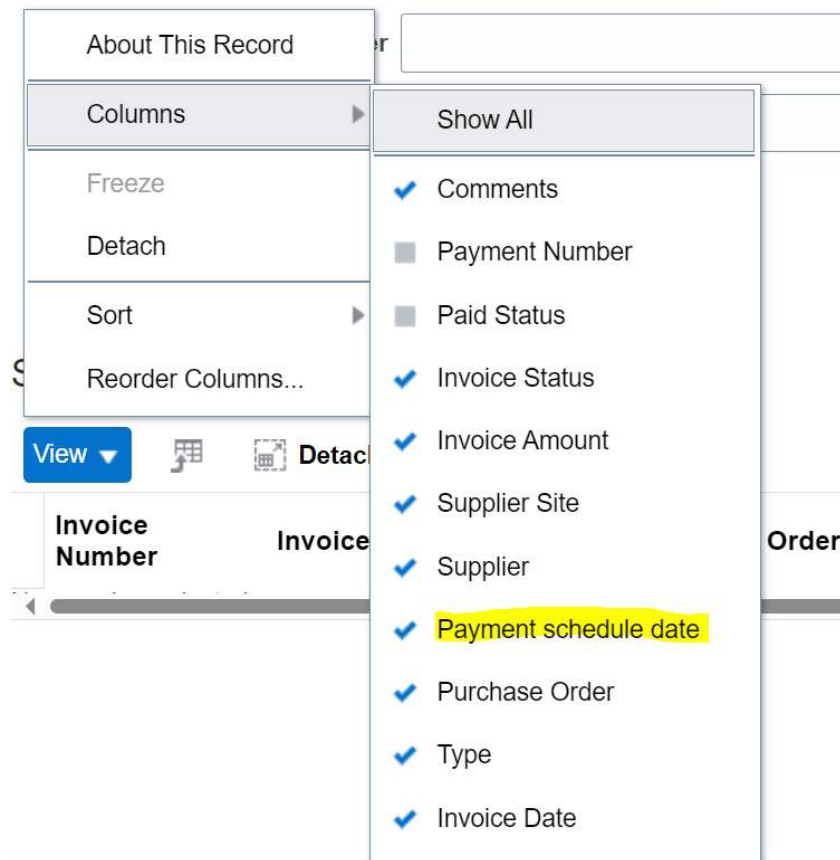
3. If you do not have the column called: "Payment schedule date". Please follow those quick steps to get it:

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 (highlighted), Freeze, Detach, Sort, and Reorder Columns... Below the menu is a 'View' button with a dropdown arrow, a grid icon, and a 'Detach' button. The table below has columns for 'Invoice Number', 'Invoice Date', and 'Type'. Above the table, there are four empty input fields, with the first one labeled '** Invoice Number'.

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.

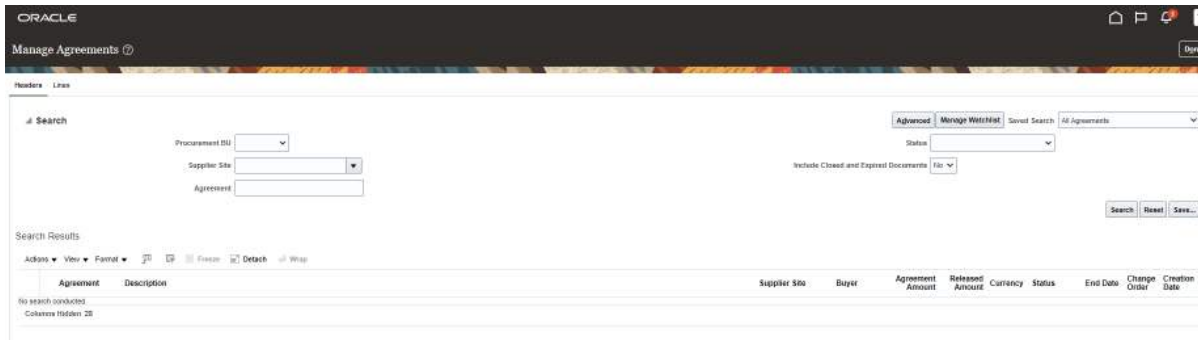
If you wish to know how our payment runs work, we invite you to visit our webpage at: [Procure-to-Pay \(PTP\) | Johnson Controls](#) (*that page also includes Invoice requirements*).

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.*

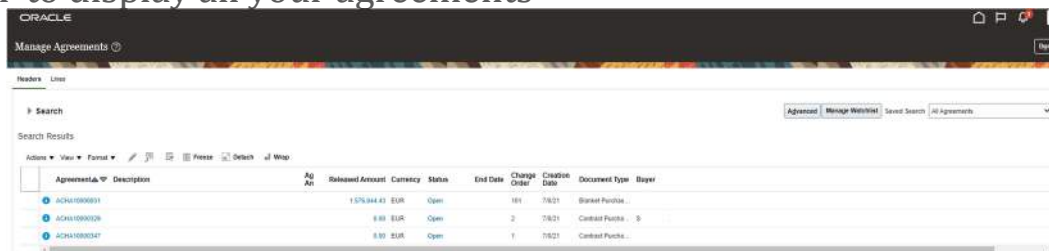
How to view and edit agreements

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

1. Click on 'Manage Agreements'

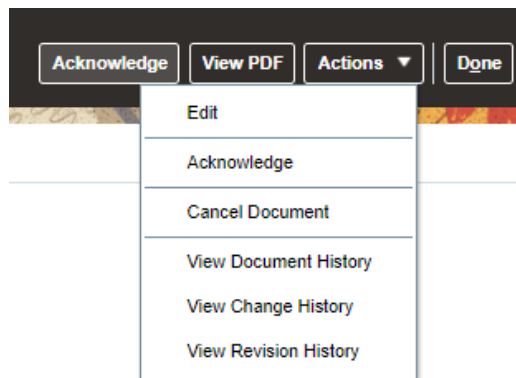
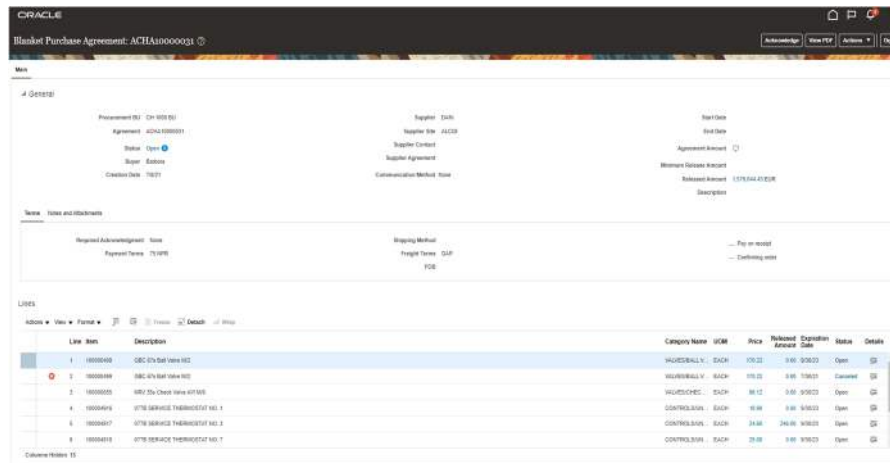


2. In the field 'Agreement', enter an agreement number and click on 'Search'. If you do not know the agreement number, click on 'Search' to display all your agreements



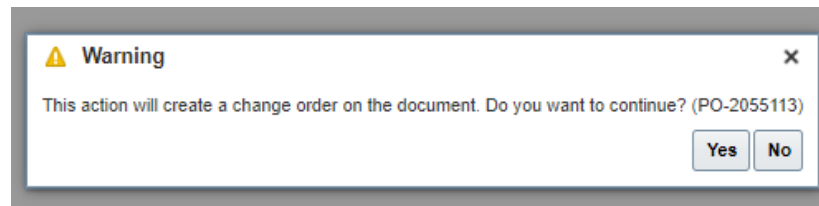
How to view and edit agreements

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



How to view and edit agreements

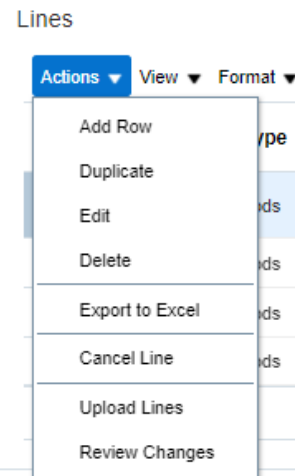
4. A pop-up warning message may appear indicating that your action will create a change order against the agreement document



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 ▾ + Freeze Detach Wrap

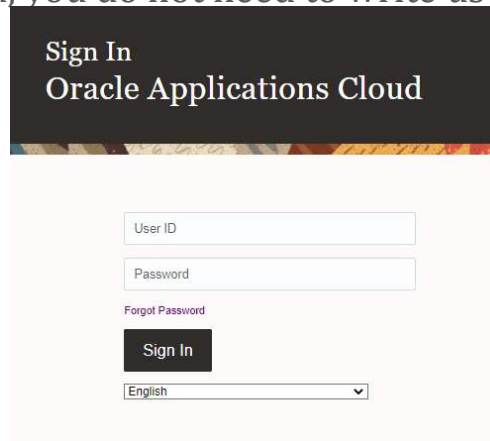
* Line	* Type	Edit	Item	* Description	* Category Name	Supplier Item	UOM	* Price	Expiration Date	Change Reason
1	Goods		100038653	A121 Alarm Sounder Red 24 V DC	FIRE DETECTION/FI	A141DC24	EACH	300.00	3/31/24	As agreed
2	Goods		100034785	Flash Lamp EX Red	ELECTRONIC COMP	98FHAD1...	EACH	365.68	3/31/23	
3	Goods		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		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

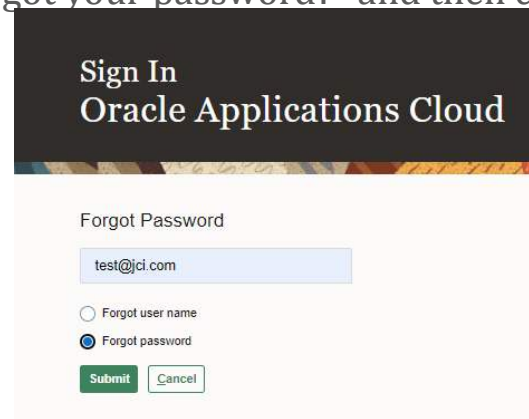
Password

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

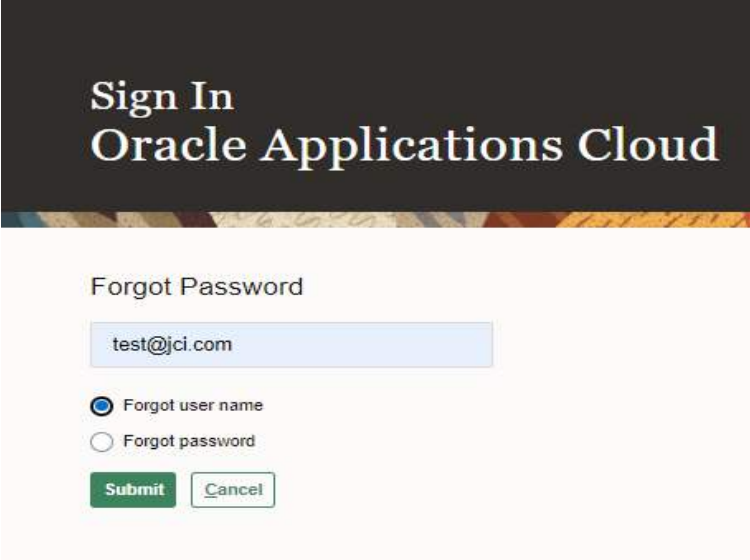
Forgot password

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. 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.

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 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.**