



Supplier Portal User Guide

Agreements



This step-by-step guide will review how to view agreements and acknowledge agreements in Supplier Portal

If you need assistance please contact suppliersupport@chattanooga.gov or (423) 643-7230.

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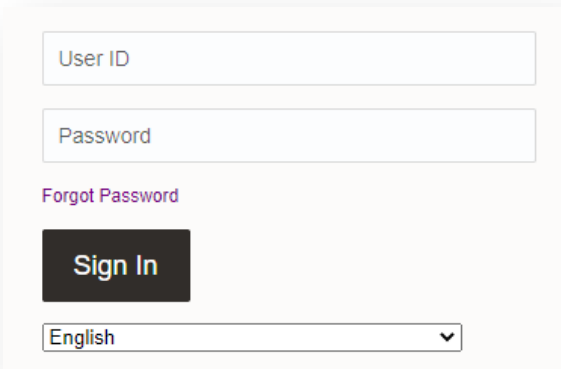
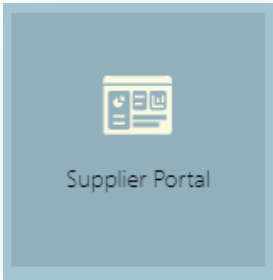


View Agreements

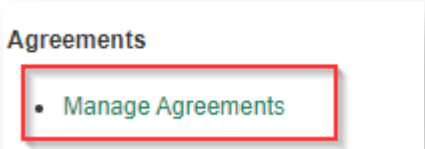
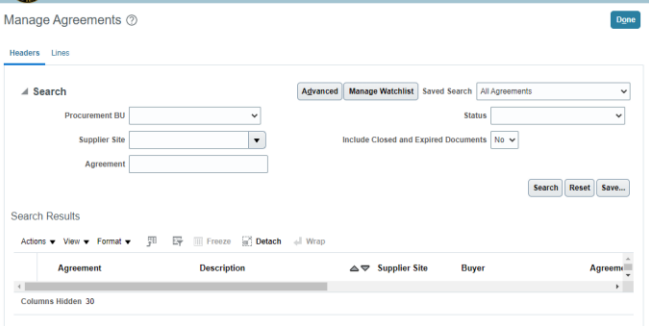

Role: Supplier Sales Representative

Objective: Learn how to view agreements.

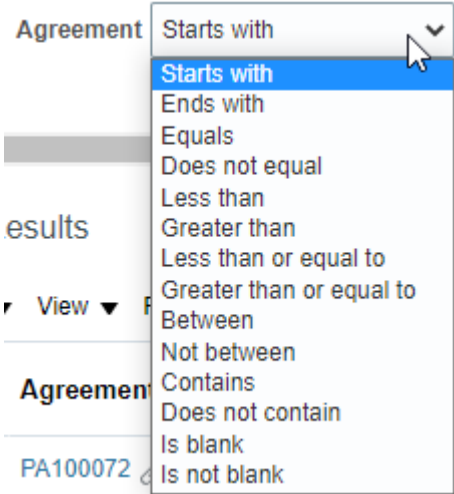
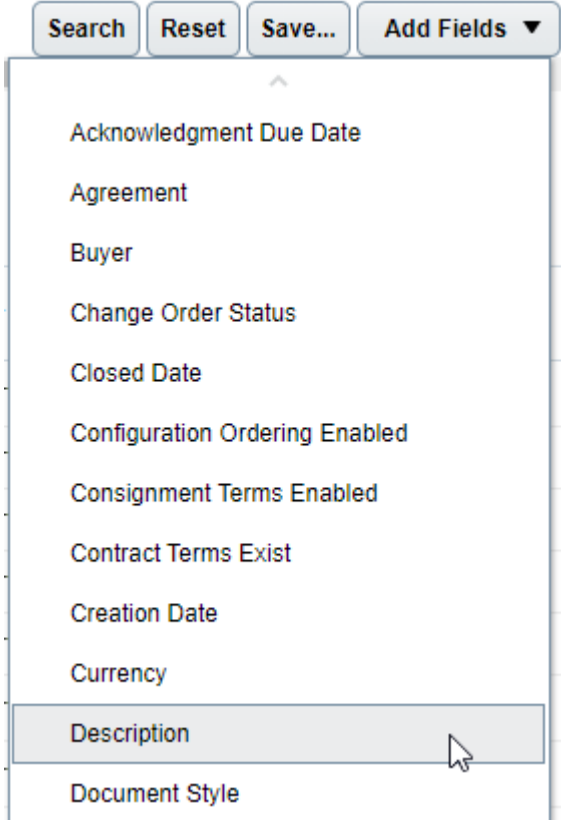
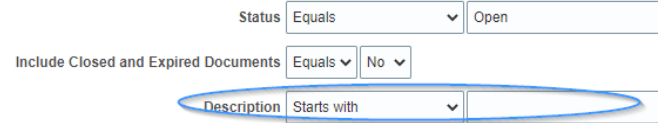
Navigation Path: Home Page > Supplier Portal

Step	Step Description	Navigation Hint
1.	Log into Supplier Portal .	
2.	Within the Home Page functional area, click on the Supplier Portal icon. Note: You can access the functional tiles by clicking the Navigator icon in the upper left-hand corner of the page or clicking the homepage's functional area.	

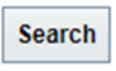






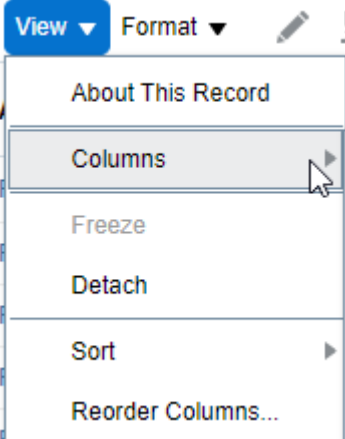


Step	Step Description	Navigation Hint
1.	From the Tasks menu click the Manage Agreements link.	
2.	The Manage Agreements page is now visible.	
3.	In the Search section enter your search criteria. For example: <ul style="list-style-type: none">• a specific Agreement number, or• Agreements with Open Status, or• Agreements that are not closed, or• Agreements that are closed.	
4.	Click the Advanced button to search using additional parameters.	

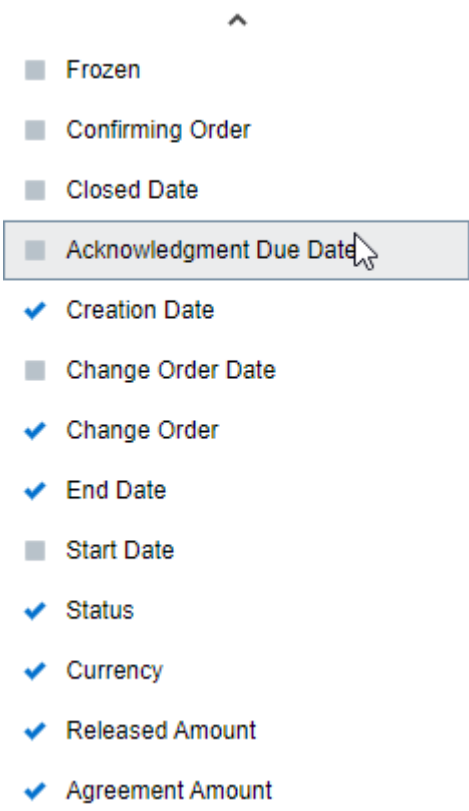



Step	Step Description	Navigation Hint
5.	<p>With Advanced Search notice more search parameters are immediately visible.</p>	
6.	<p>Click the Add Fields drop down arrow to select additional search parameter fields.</p> <p>Click the desired field name.</p>	
7.	<p>The desired field name has been added to the Search section.</p>	
8.	<p>Enter the Search parameter.</p>	



Step	Step Description	Navigation Hint									
9.	Click the Search button.										
10.	Review Agreement details in the Search Results section.	<p data-bbox="829 558 1047 594">Search Results</p> <p data-bbox="862 640 1433 674">Actions ▼ View ▼ Format ▼   </p> <table border="1" data-bbox="841 688 1463 905"><thead><tr><th data-bbox="841 688 911 783"></th><th data-bbox="911 688 1166 783">Agreement</th><th data-bbox="1166 688 1463 783">Description</th></tr></thead><tbody><tr><td data-bbox="841 783 911 848"></td><td data-bbox="911 783 1166 848">PA100072 </td><td data-bbox="1166 783 1463 848">Consulting Services</td></tr><tr><td data-bbox="841 848 911 905"></td><td data-bbox="911 848 1166 905">PA100057</td><td data-bbox="1166 848 1463 905">Professional Services</td></tr></tbody></table>		Agreement	Description		PA100072 	Consulting Services		PA100057	Professional Services
	Agreement	Description									
	PA100072 	Consulting Services									
	PA100057	Professional Services									
11.	To view more/less columns click the View drop down arrow. Select the Columns drop down arrow.										

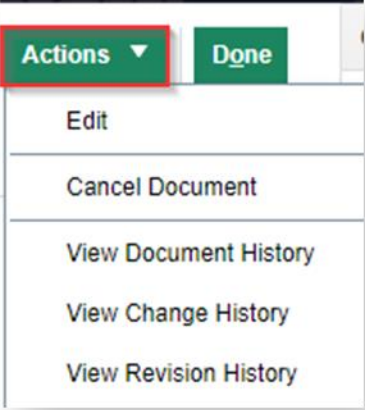
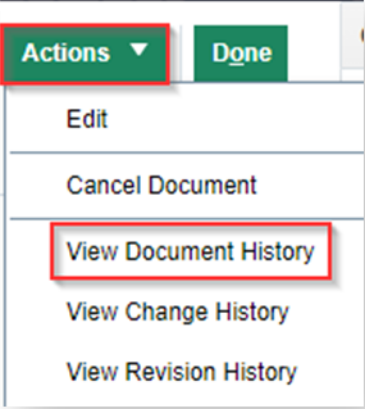



Step	Step Description	Navigation Hint
12.	Select/deselect the desired columns.	 <p>^</p> <ul style="list-style-type: none"><input type="checkbox"/> Frozen<input type="checkbox"/> Confirming Order<input type="checkbox"/> Closed Date<input checked="" type="checkbox"/> Acknowledgment Due Date<input checked="" type="checkbox"/> Creation Date<input type="checkbox"/> Change Order Date<input checked="" type="checkbox"/> Change Order<input checked="" type="checkbox"/> End Date<input type="checkbox"/> Start Date<input checked="" type="checkbox"/> Status<input checked="" type="checkbox"/> Currency<input checked="" type="checkbox"/> Released Amount<input checked="" type="checkbox"/> Agreement Amount
13.	Click the Agreement number link from the displayed agreements to view its details.	 <p>Agreement</p> <p>PA100072</p>

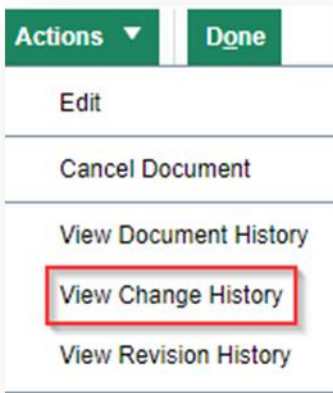

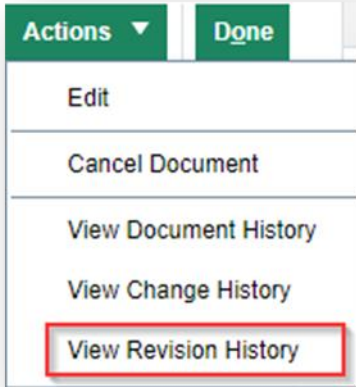



Step	Step Description	Navigation Hint
14.	<p>The Blanket Purchase Agreement or Contract Purchase Agreement page is now visible.</p> <p>Review the Agreement in detail including:</p> <ul style="list-style-type: none"> • Main tab • Contract Terms tab • Terms tab • Notes and Attachments tab • Lines, if applicable 	<p>The screenshot shows a web interface for a purchase agreement. At the top, there are two tabs: 'Main' and 'Contract Terms', both circled in blue. Below the tabs is a 'General' section with the following details: Procurement BU: City of Chattanooga Business; Agreement: PA100047; Status: Open; Buyer: Debbie J Talley; Creation Date: 5/18/21. Below this is a 'Terms' section with two tabs: 'Terms' and 'Notes and Attachments', both circled in blue. The 'Terms' section shows: Required Acknowledgment: None; Payment Terms: 30 Net. Below that is an 'Additional Information' section with 'Council Action'. At the bottom, there is a 'Lines' section with a table header and a toolbar containing 'Actions', 'View', 'Format', and 'Freeze' buttons, all of which are circled in blue.</p>
15.	Click Acknowledge if the document is pending Acknowledgement.	<p>A blue rectangular button with the text 'Acknowledge' in white.</p>
16.	Click View PDF to view the document in PDF version.	<p>A blue rectangular button with the text 'View PDF' in white.</p>

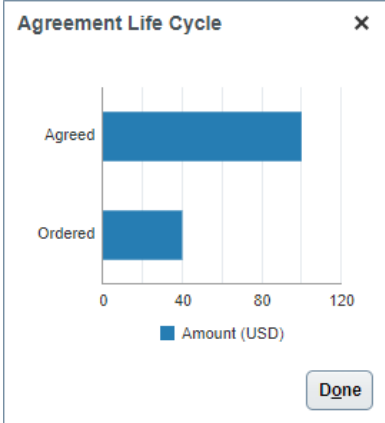


Step	Step Description	Navigation Hint
17.	Click Actions . View Actions available for this agreement.	
18.	View the Document History .	
19.	Click Done .	



Step	Step Description	Navigation Hint
20.	View the Change History .	
21.	Click Done .	
22.	View the Revision History .	
23.	Click Done .	



Step	Step Description	Navigation Hint
24.	To view the Agreement Lifecycle click the Lifecycle icon next to the Agreement Amount.	 <p>The screenshot shows a popup window titled "Agreement Life Cycle" with a close button (X) in the top right corner. It contains a horizontal bar chart with two categories: "Agreed" and "Ordered". The "Agreed" bar extends to approximately 100 on the x-axis, while the "Ordered" bar extends to approximately 40. The x-axis is labeled "Amount (USD)" and has tick marks at 0, 40, 80, and 120. A legend below the chart shows a blue square next to the text "Amount (USD)". A "Done" button is located in the bottom right corner of the popup.</p>
25.	Click the Done button to close the Lifecycle popup.	

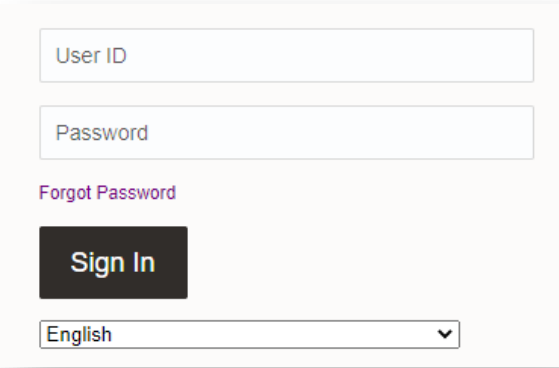



Acknowledge Agreement in Supplier Portal

Role: Supplier Sales Representative

Objective: Learn how to acknowledge agreements in Supplier Portal.

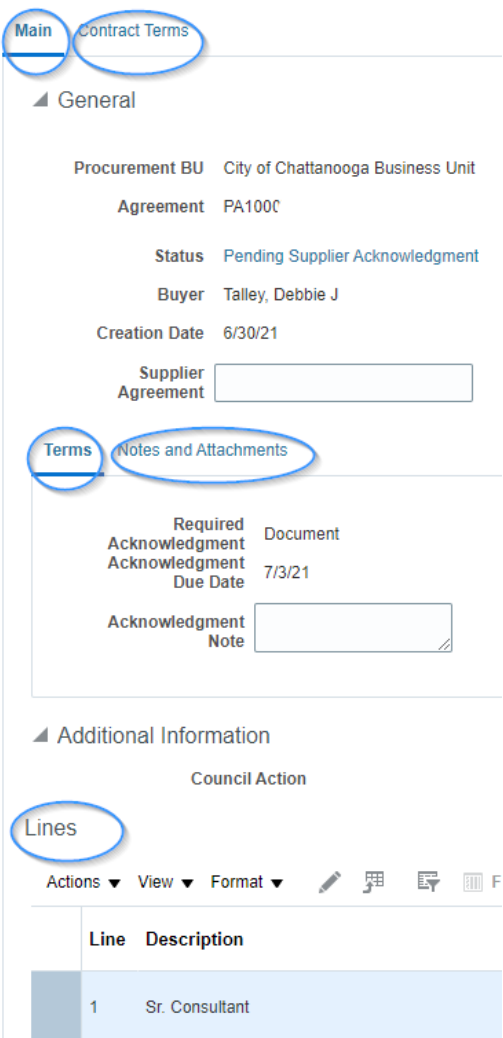
Navigation Path: Home Page > Supplier Portal

Step	Step Description	Navigation Hint
1.	<p>There are 3 ways to be notified that an agreement needs to be acknowledged.</p> <ol style="list-style-type: none">1. Bell Notification & Things to Finish2. Requiring Attention Infolet on dashboard3. Manage Agreements page <p>The City gives 3 days for acknowledgement to be completed.</p>	
2.	<p>Log into Supplier Portal.</p>	
3.	<p>OPTION 1:</p> <p>BELL NOTIFICATION</p> <p>Click the bell notification icon. Your notifications are now visible</p>	



Step	Step Description	Navigation Hint
4.	<p>THINGS TO FINISH</p> <p>In the Things to Finish section you will also have an infotile visible.</p> <p>(Bell Notifications and Things to Finish Infotiles match.)</p>	
5.	<p>Click the Document Requires Acknowledgement link.</p>	
6.	<p>Click the Review and Acknowledge link.</p>	

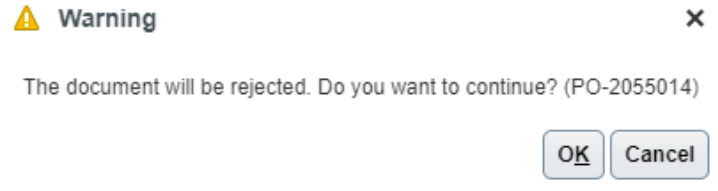
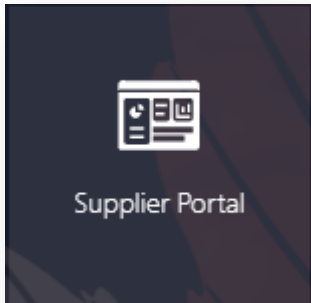
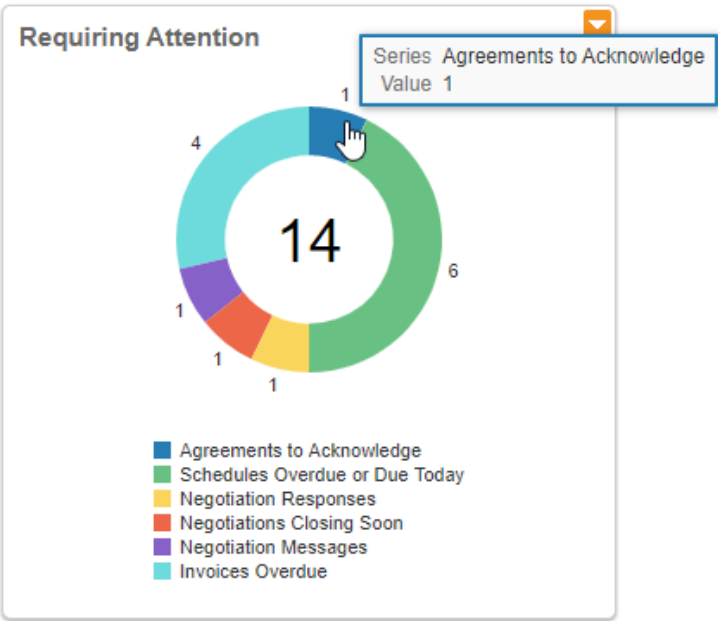


Step	Step Description	Navigation Hint
7.	<p>The Acknowledge Document page is now visible.</p> <p>Review the Agreement in detail including:</p> <ul style="list-style-type: none">• Main tab• Contract Terms tab• Terms tab• Notes and Attachments tab• Lines, if applicable	 <p>The screenshot shows a web interface for an agreement. At the top, there are two tabs: 'Main' and 'Contract Terms', both circled in blue. Below the tabs is a section titled 'General' with the following fields: Procurement BU (City of Chattanooga Business Unit), Agreement (PA1000), Status (Pending Supplier Acknowledgment), Buyer (Talley, Debbie J), and Creation Date (6/30/21). There is an empty text box for 'Supplier Agreement'. Below this is another section titled 'Terms' with two tabs: 'Terms' and 'Notes and Attachments', both circled in blue. The 'Terms' tab is active, showing 'Required Acknowledgment' (Document), 'Acknowledgment Due Date' (7/3/21), and an empty text box for 'Acknowledgment Note'. Below the 'Terms' section is 'Additional Information' with a 'Council Action' field. At the bottom, there is a 'Lines' section with a table. The 'Lines' tab is circled in blue. The table has columns 'Line' and 'Description' and contains one row: Line 1, Sr. Consultant. Above the table are menu options: 'Actions', 'View', 'Format', and several icons.</p>


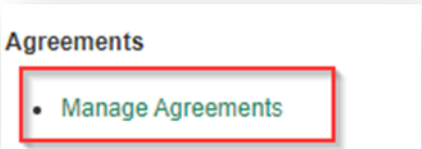
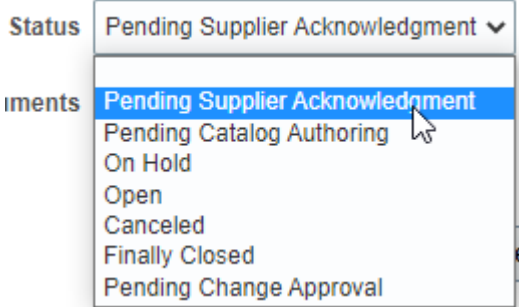



Step	Step Description	Navigation Hint
8.	<p>To Accept:</p> <ul style="list-style-type: none"> • Enter the Supplier Agreement number to confirm. • Enter an Acknowledgement Note 	<p>▲ General</p> <p>Procurement BU City of Chattanooga Business Unit</p> <p>Agreement PA100</p> <p>Status Pending Supplier Acknowledgment</p> <p>Buyer Talley, Debbie J</p> <p>Creation Date 6/30/21</p> <p>Supplier Agreement <input type="text" value="PA100"/></p> <p>Required Acknowledgment Document</p> <p>Acknowledgment Due Date 7/3/21</p> <p>Acknowledgment Note <input type="text" value="Received and confirmed"/></p>
9.	Click Accept button	<p>View PDF Accept Reject Cancel</p>
10.	<p>To Reject:</p> <ul style="list-style-type: none"> • Enter an Acknowledgement Note • In the Lines section on enter Rejection Reason (Lines do not apply for Contract Purchase Agreements) 	<p>Required Acknowledgment Document</p> <p>Acknowledgment Due Date 7/3/21</p> <p>Acknowledgment Note <input type="text"/></p> <p>Rejection Reason <input type="text"/></p>






Step	Step Description	Navigation Hint
11.	Click OK to Continue.	
12.	<p>OPTIONS 2 & 3</p> <p>Within the Home Page functional area, click on the Supplier Portal icon.</p> <p>Note: You can access the functional files by clicking the Navigator icon in the upper left-hand corner of the page or clicking the homepage's functional area.</p>	
13.	<p>REQUIRING ATTENTION INFOLET (OPTION 2)</p> <p>View the Requiring Attention infolet. Click to view the various items.</p> <p>Hover over the circle to view Agreements to Acknowledge, if applicable.</p> <p>Click on the section to view the Agreement.</p>	



Step	Step Description	Navigation Hint
14.	The Agreement is now visible.	
15.	Click the Acknowledge button.	
16.	To Accept or Reject repeat steps 7 to 11	
17.	<p>Option 3</p> <p>After clicking the Supplier Portal icon click on Manage Agreements.</p>	
18.	<p>Click the Status drop-down arrow.</p> <p>Select Pending Supplier Acknowledgement from the drop-down list.</p>	
19.	Click the Search button.	



Step	Step Description	Navigation Hint
20.	Click the Agreement Number link to review the details.	
21.	Click the Acknowledge button.	
22.	To Accept or Reject repeat steps 7 to 11	
23.	Click the Done button.	

Supplier Portal Support

We are available to assist you! Contact suppliersupport@chattanooga.gov or (423) 643-7230.