



Supplier Portal User Guide

Purchase Orders



This step-by-step guide will review how to view and acknowledge purchase orders issued by the City of Chattanooga.

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

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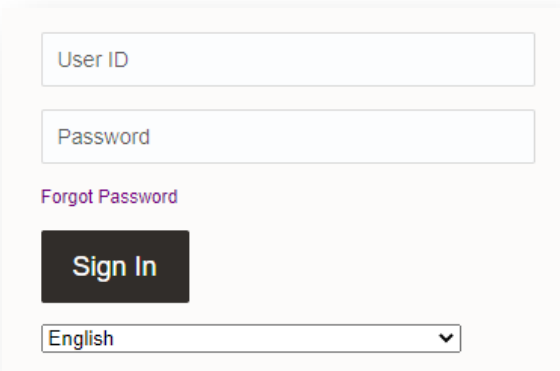
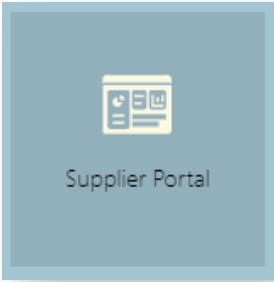


View Purchase Orders

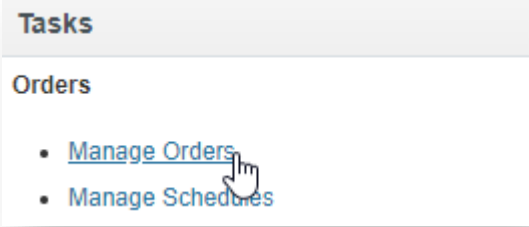
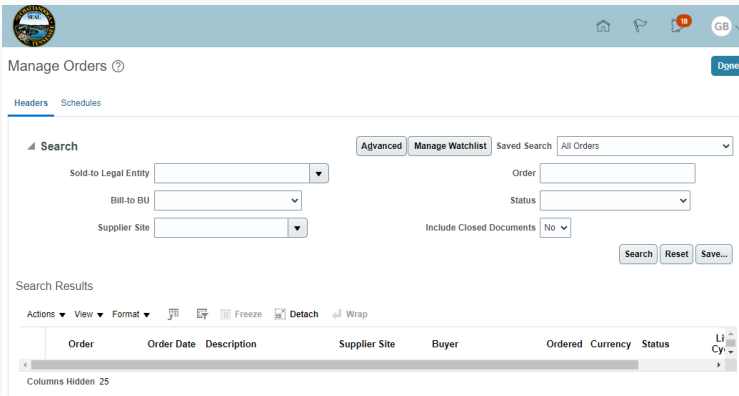
Roles: Supplier Bidder, Supplier Sales Representative, Supplier Customer Service Representative

Objective: Learn how to View Purchase Orders

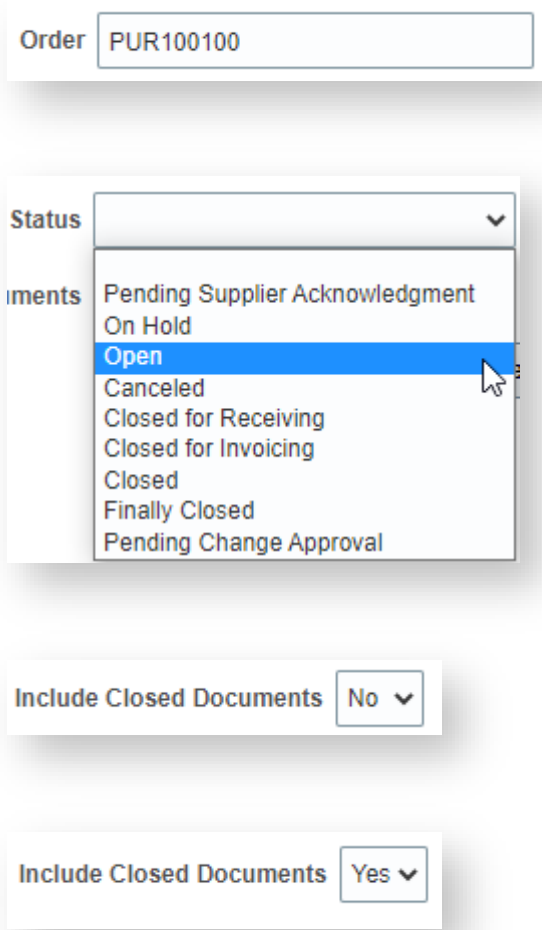
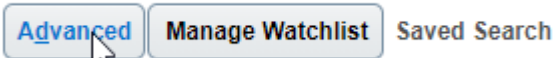
Navigation Path: Home Page > Supplier Portal

| 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. |  |

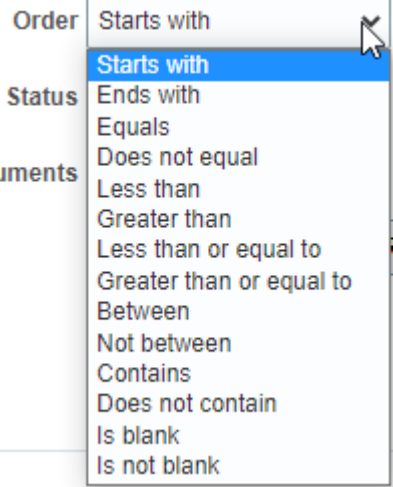
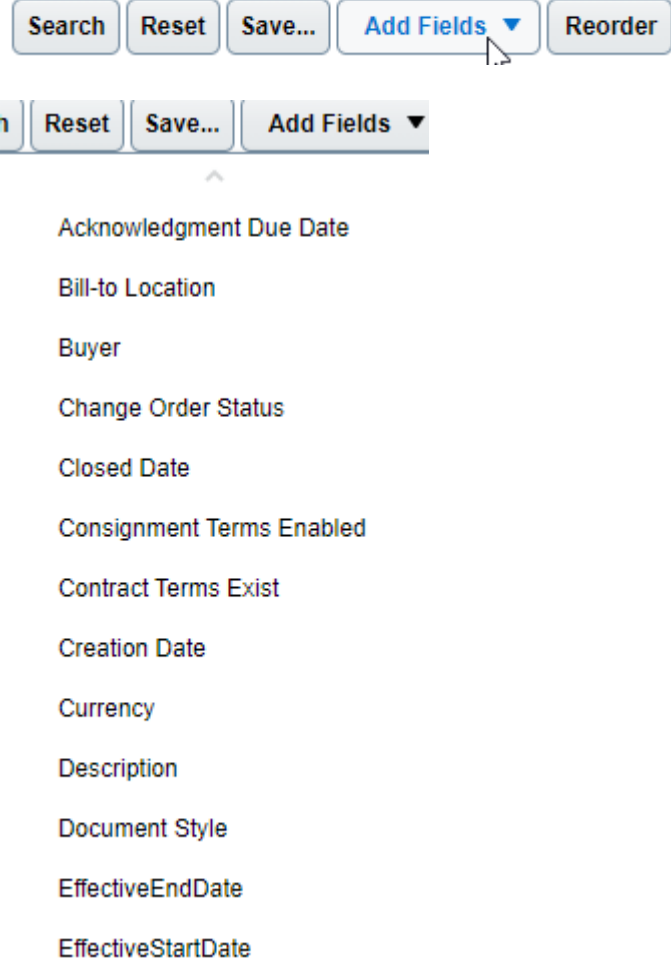


| Step | Step Description | Navigation Hint |
|------|------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|
| 1. | From the Tasks menu click the Manage Orders link under the Orders section. |  |
| 2. | The Manage Orders page is now visible. |  |

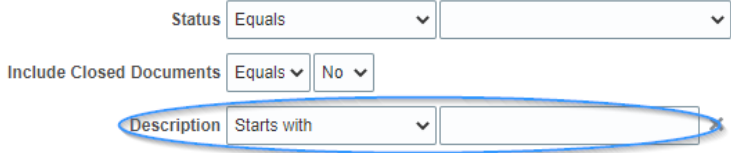
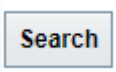
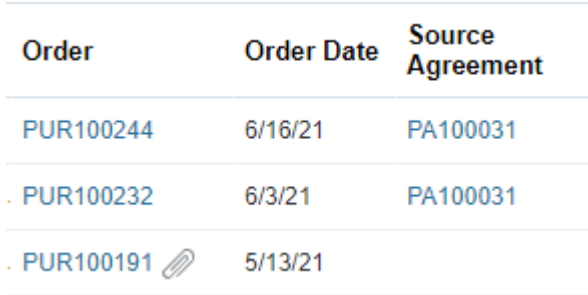
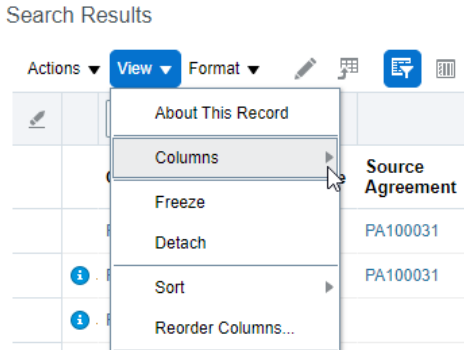


| Step | Step Description | Navigation Hint |
|------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 3. | <p>In the Search section enter your search criteria.</p> <p>For example:</p> <ul style="list-style-type: none">• a specific PO number, or• Orders with Open Status, or• All Orders that are not closed, or• All Orders that are closed. |  <p>Order <input type="text" value="PUR100100"/></p> <p>Status <input type="text" value="Open"/></p> <p>Include Closed Documents <input type="text" value="No"/></p> <p>Include Closed Documents <input type="text" value="Yes"/></p> |
| 4. | <p>Click the Advanced button to search using additional parameters.</p> |  <p>Advanced Manage Watchlist Saved Search</p> |

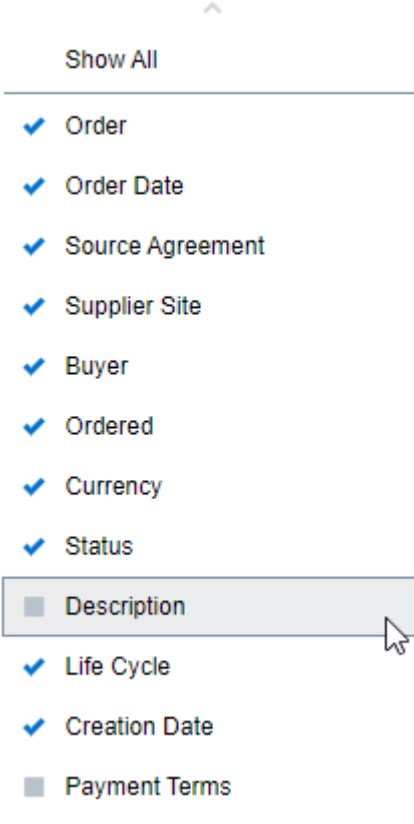
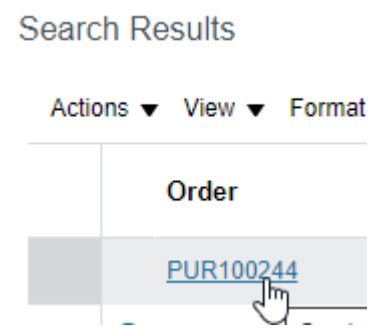


| Step | Step Description | Navigation Hint |
|------|---------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 5. | <p>With Advanced Search notice more search parameters are immediately visible.</p> |  <p>Order Starts with</p> <p>Status Starts with</p> <p>Ends with</p> <p>Equals</p> <p>Does not equal</p> <p>Less than</p> <p>Greater than</p> <p>Less than or equal to</p> <p>Greater than or equal to</p> <p>Between</p> <p>Not between</p> <p>Contains</p> <p>Does not contain</p> <p>Is blank</p> <p>Is not blank</p> |
| 6. | <p>Click the Add Fields drop down arrow to select additional search parameter fields.</p> <p>Click the desired field name.</p> |  <p>Search Reset Save... Add Fields Reorder</p> <p>Reset Save... Add Fields</p> <p>Acknowledgment Due Date</p> <p>Bill-to Location</p> <p>Buyer</p> <p>Change Order Status</p> <p>Closed Date</p> <p>Consignment Terms Enabled</p> <p>Contract Terms Exist</p> <p>Creation Date</p> <p>Currency</p> <p>Description</p> <p>Document Style</p> <p>EffectiveEndDate</p> <p>EffectiveStartDate</p> |



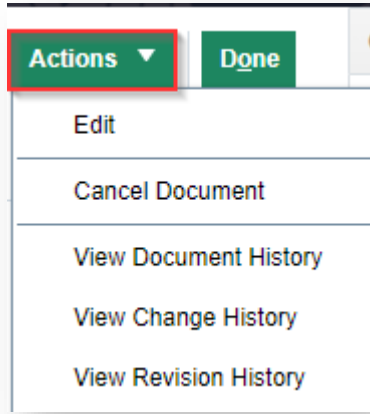
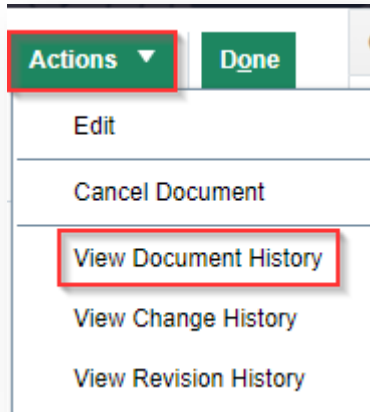



| Step | Step Description | Navigation Hint | | | | | | | | | | | | |
|-----------|--------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------|------------|------------------|-----------|---------|----------|-----------|--------|----------|-----------|---------|--|
| 7. | The desired field name has been added to the Search section. |  | | | | | | | | | | | | |
| 8. | Enter Search parameter. | | | | | | | | | | | | | |
| 9. | Click the Search button. |  | | | | | | | | | | | | |
| 10. | Review Order details in the Search Results section. |  <table border="1"> <thead> <tr> <th>Order</th> <th>Order Date</th> <th>Source Agreement</th> </tr> </thead> <tbody> <tr> <td>PUR100244</td> <td>6/16/21</td> <td>PA100031</td> </tr> <tr> <td>PUR100232</td> <td>6/3/21</td> <td>PA100031</td> </tr> <tr> <td>PUR100191 </td> <td>5/13/21</td> <td></td> </tr> </tbody> </table> | Order | Order Date | Source Agreement | PUR100244 | 6/16/21 | PA100031 | PUR100232 | 6/3/21 | PA100031 | PUR100191 | 5/13/21 | |
| Order | Order Date | Source Agreement | | | | | | | | | | | | |
| PUR100244 | 6/16/21 | PA100031 | | | | | | | | | | | | |
| PUR100232 | 6/3/21 | PA100031 | | | | | | | | | | | | |
| PUR100191 | 5/13/21 | | | | | | | | | | | | | |
| 11. | To view more/less columns click the View drop down arrow. Select the Columns drop down arrow. |  | | | | | | | | | | | | |

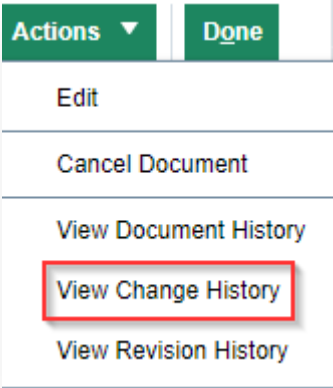

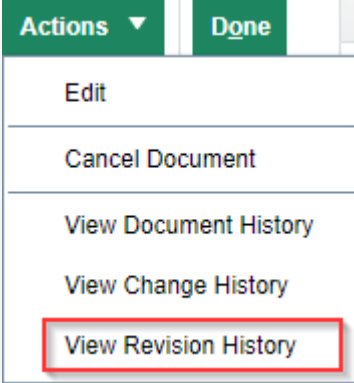



| Step | Step Description | Navigation Hint | | |
|---------------------------|-----------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------|---------------------------|
| 12. | <p>Select/deselect the desired columns.</p> <p>The columns will update based on your selection/deselection.</p> |  <p>^</p> <p>Show All</p> <hr/> <ul style="list-style-type: none"><input checked="" type="checkbox"/> Order<input checked="" type="checkbox"/> Order Date<input checked="" type="checkbox"/> Source Agreement<input checked="" type="checkbox"/> Supplier Site<input checked="" type="checkbox"/> Buyer<input checked="" type="checkbox"/> Ordered<input checked="" type="checkbox"/> Currency<input checked="" type="checkbox"/> Status<input checked="" type="checkbox"/> Description<input checked="" type="checkbox"/> Life Cycle<input checked="" type="checkbox"/> Creation Date<input type="checkbox"/> Payment Terms | | |
| 13. | <p>Click the Order number link from the displayed orders to view its details.</p> |  <p>Search Results</p> <p>Actions ▼ View ▼ Format</p> <hr/> <table><thead><tr><th>Order</th></tr></thead><tbody><tr><td>PUR100244</td></tr></tbody></table> | Order | PUR100244 |
| Order | | | | |
| PUR100244 | | | | |
| 14. | <p>The Purchase Order page is now visible.</p> <p>Review the Order in detail.</p> | | | |


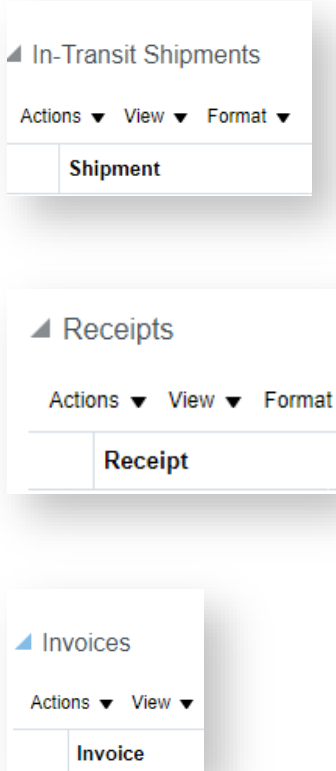


| Step | Step Description | Navigation Hint |
|------|---------------------------------------------------------------------------------|--------------------------------------------------------------------------------------|
| 15. | Click the Acknowledge button if the document is pending acknowledgement. |  |
| 16. | Click the View PDF button and view the document in PDF version. |  |
| 17. | Click Actions to review the list of actions available for the document. |  |
| 18. | View the Document History . |  |
| 19. | Click the Done button. |  |




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



| Step | Step Description | Navigation Hint |
|------|----------------------------------------------------------------|-------------------------------------------------------------------------------------|
| 24. | To view the PO Lifecycle, click the View Details button |  |
| 25. | Review the details of Shipments, Receipts, and Invoices. |  |



| Step | Step Description | Navigation Hint |
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| 26. | Click the Done button. |  |

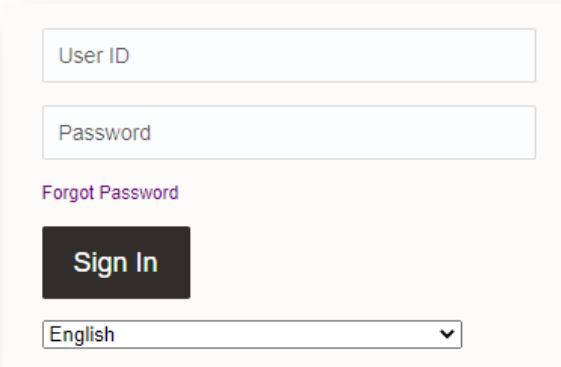


Acknowledge Purchase Order in Supplier Portal

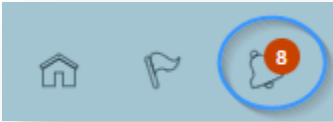
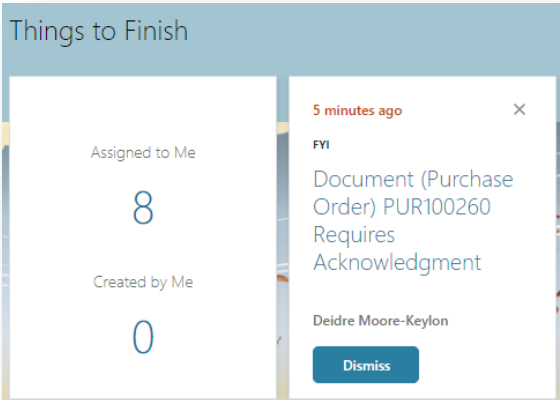
Role: Supplier Bidder, Supplier Customer Service Representative.

Objective: Learn how to Acknowledge Purchase Orders in Supplier Portal.

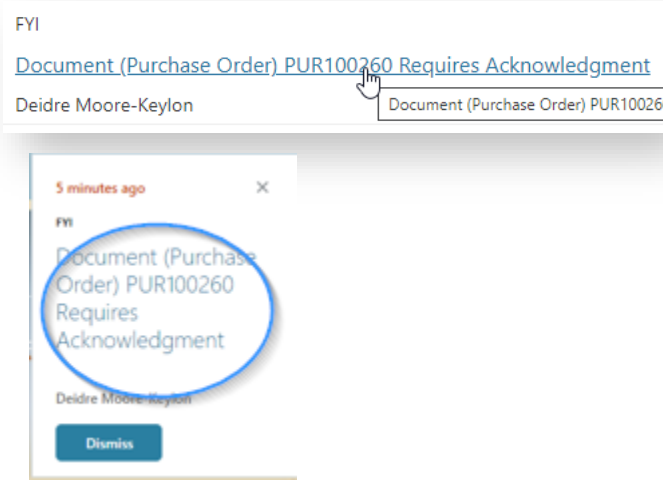
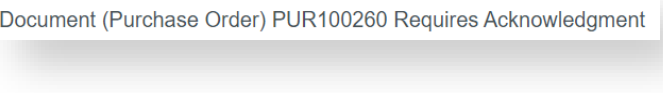
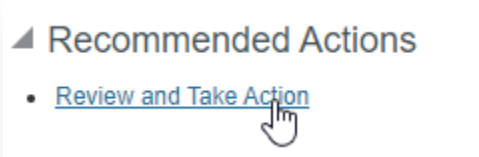
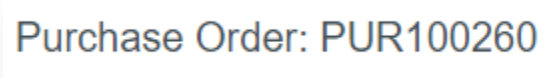
Navigation Path: Home Page > Supplier Portal

| Step | Step Description | Navigation Hint |
|------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------|
| 1. | <p>There are 3 ways to be notified that a Purchase Order needs to be acknowledged.</p> <ol style="list-style-type: none">1. Bell Notification & Things to Finish2. Requiring Attention Infolet on dashboard3. Manage Order page <p>The City gives 3 days for acknowledgement to be completed.</p> | |
| 2. | <p>Log into Supplier Portal.</p> |  |

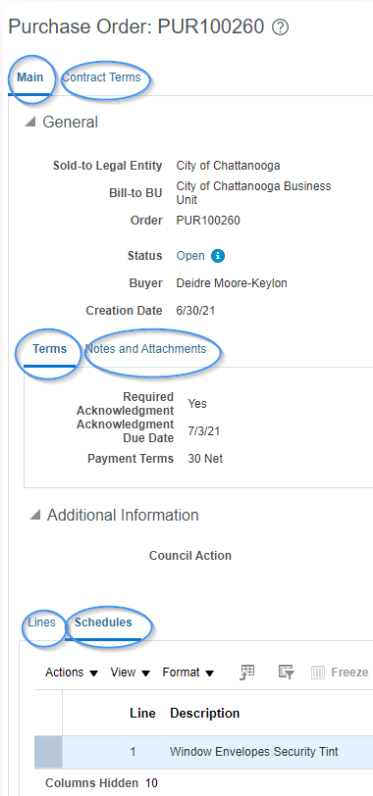




| Step | Step Description | Navigation Hint |
|------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 3. | <p>OPTION 1:</p> <p>BELL NOTIFICATION</p> <p>Click the bell notification icon. Your notifications are now visible.</p> <p>and/or</p> <p>THINGS TO FINISH</p> <p>In the Things to Finish section you will also have an infotile visible. (Bell Notifications and Things to Finish Infotiles match.)</p> |  <p>Notifications</p> <p>FYI Document (Purchase Order) PUR100260 Requires Acknowledgment Deidre Moore-Keylon</p>  |

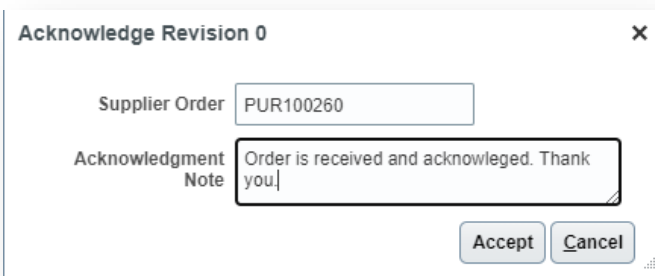
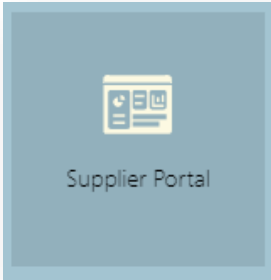


| Step | Step Description | Navigation Hint |
|------|---------------------------------------------------------------------|--------------------------------------------------------------------------------------|
| 4. | Click the Document Requires Acknowledgement link. |  |
| 5. | The Document Requires Acknowledgement window is now visible. |  |
| 6. | Click the Review and Take Action link. |  |
| 7. | The Purchase Order page is now visible. |  |

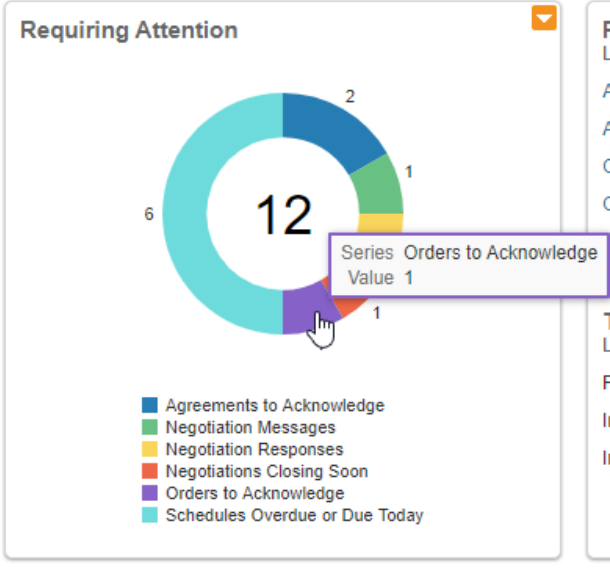
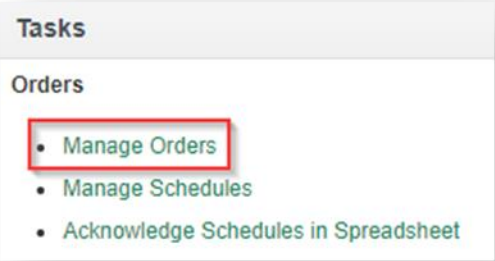
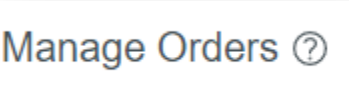
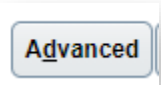


| Step | Step Description | Navigation Hint | | | | |
|------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------|-------------|---|--------------------------------|
| 8. | <p>Review the Purchase Order thoroughly:</p> <ul style="list-style-type: none">• Main tab• Contract Terms tab, if applicable• Terms• Notes and Attachments• Lines and Schedules tabs |  <p>Purchase Order: PUR100260 ?</p> <p>Main Contract Terms</p> <p>General</p> <p>Sold-to Legal Entity City of Chattanooga Bill-to BU City of Chattanooga Business Unit Order PUR100260 Status Open Buyer Deidre Moore-Keylon Creation Date 6/30/21</p> <p>Terms Notes and Attachments</p> <p>Required Acknowledgment Yes Acknowledgment Due Date 7/3/21 Payment Terms 30 Net</p> <p>Additional Information</p> <p>Council Action</p> <p>Lines Schedules</p> <p>Actions View Format Freeze</p> <table border="1"><thead><tr><th>Line</th><th>Description</th></tr></thead><tbody><tr><td>1</td><td>Window Envelopes Security Tint</td></tr></tbody></table> <p>Columns Hidden 10</p> | Line | Description | 1 | Window Envelopes Security Tint |
| Line | Description | | | | | |
| 1 | Window Envelopes Security Tint | | | | | |
| 9. | <p>Optional: Click the View PDF button to see the Purchase Order in PDF.</p> |  | | | | |
| 10. | <p>The PDF will download. Review.</p> | | | | | |
| 11. | <p>To Acknowledge the purchase order, click the Acknowledge button.</p> |  | | | | |

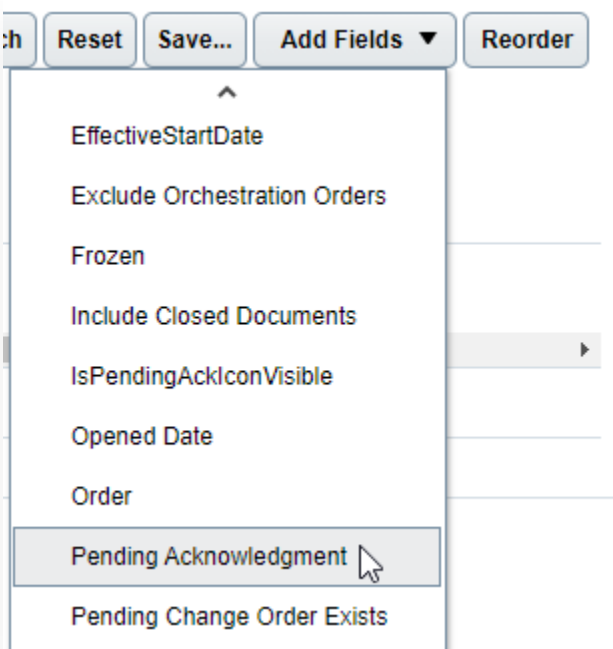
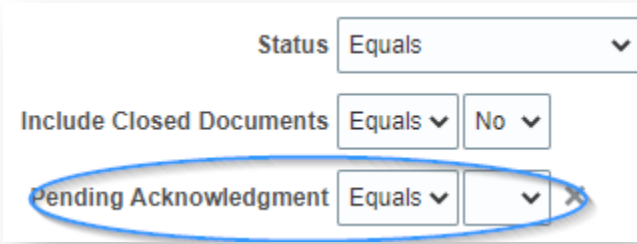
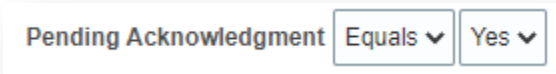
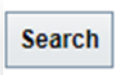


| Step | Step Description | Navigation Hint |
|------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|
| 12. | <p>The Acknowledge window is now visible.</p> <p>In the Supplier Order field enter the purchase order number.</p> |  |
| 13. | Click Accept button. | |
| 14. | <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> |  |



| Step | Step Description | Navigation Hint |
|------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------|
| 15. | <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 Orders to Acknowledge, if applicable.</p> <p>To view it further proceed to click on Manage Order.</p> |  |
| 16. | <p>MANAGE ORDER PAGE (OPTION 3)</p> <p>Click on Manage Order.</p> |  |
| 17. | <p>The Manage Order Page is now visible.</p> |  |
| 18. | <p>Click Advanced button.</p> |  |

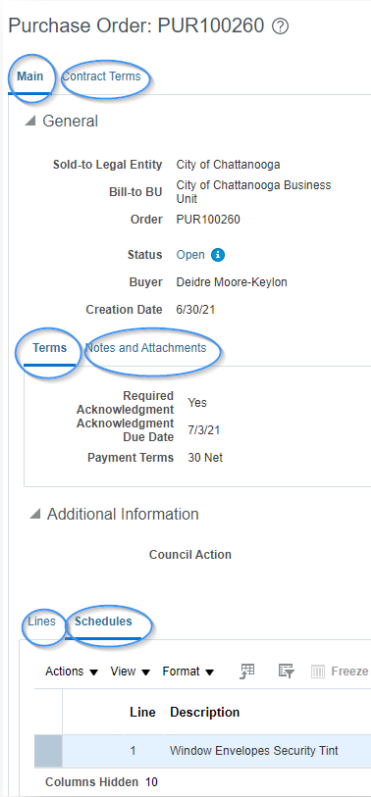

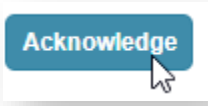


| Step | Step Description | Navigation Hint |
|------|-------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------|
| 19. | Click Add Fields drop-down arrow. Select Pending Acknowledgment from drop-down list. |  |
| 20. | Pending Acknowledgment field is added to Advanced Search options. |  |
| 21. | Select Yes from the drop-down menu. |  |
| 22. | Click Search . |  |

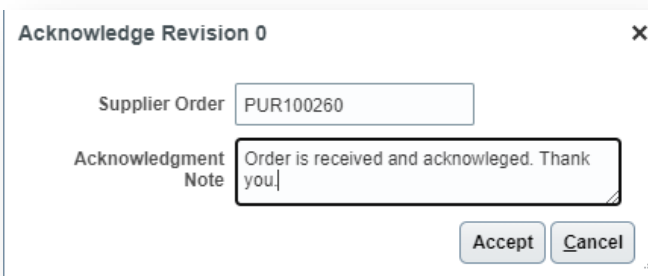


| Step | Step Description | Navigation Hint |
|------|------------------------------------------------------------------------------------------|-----------------|
| 23. | The Information icon is visible. Hover over or click icon to view information. | |
| 24. | Click the Purchase Order number link. | |
| 25. | The Purchase Order page is now visible. | |



| Step | Step Description | Navigation Hint | | | | |
|------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------|-------------|---|--------------------------------|
| 26. | <p>Review the Purchase Order thoroughly:</p> <ul style="list-style-type: none">• Main tab• Contract Terms tab, if applicable• Terms• Notes and Attachments• Lines and Schedules tabs |  <p>Purchase Order: PUR100260 ?</p> <p>Main Contract Terms</p> <p>General</p> <p>Sold-to Legal Entity City of Chattanooga Bill-to BU City of Chattanooga Business Unit Order PUR100260 Status Open Buyer Deidre Moore-Keylon Creation Date 6/30/21</p> <p>Terms Notes and Attachments</p> <p>Required Acknowledgment Yes Acknowledgment Due Date 7/3/21 Payment Terms 30 Net</p> <p>Additional Information</p> <p>Council Action</p> <p>Lines Schedules</p> <p>Actions View Format Freeze</p> <table border="1"><thead><tr><th>Line</th><th>Description</th></tr></thead><tbody><tr><td>1</td><td>Window Envelopes Security Tint</td></tr></tbody></table> <p>Columns Hidden 10</p> | Line | Description | 1 | Window Envelopes Security Tint |
| Line | Description | | | | | |
| 1 | Window Envelopes Security Tint | | | | | |
| 27. | <p>Optional: Click the View PDF button to see the Purchase Order in PDF. The PDF will download. Review.</p> |  | | | | |
| 28. | <p>To Acknowledge the purchase order, click the Acknowledge button.</p> |  | | | | |



| Step | Step Description | Navigation Hint |
|------|---------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------|
| 29. | <p>The Acknowledge window is now visible.</p> <p>In the Supplier Order field enter the purchase order number.</p> |  |
| 30. | Click Accept button. | |

Supplier Portal Support

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