



CITY OF CHATTANOOGA PURCHASING DEPARTMENT
CREATING AN INVOICE QUICKSTART GUIDE
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- After logging into the portal and navigating to the dashboard, click on **CREATE INVOICE** in the task list on the left.
- In the left column at the top, enter your purchase order number starting with **PUR**.
- The software will automatically fill in the remaining information in the left hand column. Tax Registration information is not required.
- In the center column, in the box next to **Remit-to Bank Account** if you are setup for ACH you can click on the down arrow to select your bank account. If you are setup for payment by check this box will be grayed out.
- In the box labeled **Description** please enter a brief overview of what you are invoicing for.
- Underneath the Description box you find the word **Attachments with a small plus sign** next to it. When you click on the plus sign, a new dialog box will open.
- Click on the **Choose File** button. The software will open a new window giving you access to your computer's directory where you can select a copy of the invoice produced in your company's system.
- All invoices must contain the purchase order number and a specific invoice number.
- In the right hand column, enter the exact number from your invoice. The AP team matches the entered information against the provided invoice.
- Enter the date the invoice is being created.
- When all three columns are complete, click **Save** in the top right of the page.
- This will activate the PO to allow you to pull in lines from the system. After clicking save, you will notice that the PO number is grayed out.

- In the ribbon under the word lines, look for an icon that is a **small square with a tiny plus sign** on it. When you hover your mouse over it, **Select & Add** will appear. Click on the icon to open a new dialog box.
- In the dialog box you will see the exact lines as they are listed on the PO. To select them to be added to your invoice, click on the line highlighting it in blue and then click on the **Apply** button at the bottom right of the dialog box.
- Depending on what you are invoicing for, there may only be one line or several. To add additional line items keep highlighting in blue and click apply.
- When all are added click **OK** in the bottom right of the box.
- The information is now in the invoice for you to modify the quantity you are invoicing for. The Total Quantity is what is still authorized on the PO. The same amount will show under Quantity. If you are invoicing for less, delete the amount under **Quantity** and enter the amount required. For example you are authorized for 10 widgets but only have provided 5.
- Some purchase orders are setup as amount based for a total dollar amount where the supplier will invoice smaller amounts throughout a period of time. In these instances, scroll all the way to the right and change the dollar amount under Total.
- The software will automatically total the invoice at the bottom of the page.
- If you are satisfied with the information, click the **Submit** button.

Questions?? Need Support?? Please reach out to suppliersupport@chattanooga.gov