Supplier Portal User Guide

Manage Supplier Profile

This step-by-step guide will review how to manage your company profile including organization details, addresses, contacts, business certifications, bank accounts and products & services. Suppliers are encouraged to actively manage their profiles to ensure accurate and up-to-date information.

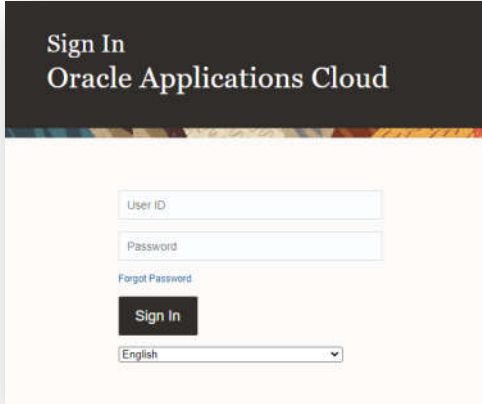If you need assistance please contact suppliersupport@chattanooga.gov or (423) 643-7230.

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Manage Supplier Profile

Log in to Supplier Portal

Step	Step Description	Navigation Hint
1.	Click on Supplier Portal Login page link.	Sign In Oracle Applications Cloud User ID Password Forgot Password Sign In English
2.	Enter **User ID**. This will be your email address. Enter **Password**.	User ID Password
3.	Click **Sign In** button.	Sign In
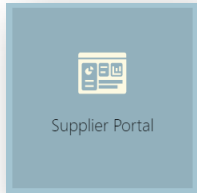
Forgot User ID or Password

Step	Step Description	Navigation Hint
4.	Click **Forgot Password** link.	User ID / Password / Forgot Password / Sign In
5.	Enter your User Name or Email in the field.	Forgot Password / User Name or Email
6.	Click **Forgot user name** radio button if you forgot your user name. or Click **Forgot password** if you forgot your password. Click **Submit** button	Forgot user name / Forgot password / Submit / Cancel
7.	You will receive an email notifying you of your user name and/or password.	

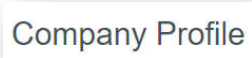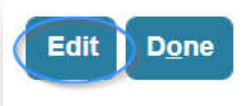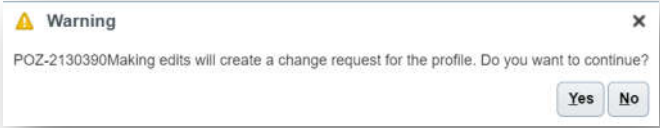| Step	Step Description	Navigation Hint
8.	Follow instructions to Log In to Supplier Portal.	

Home Page

Step	Step Description	Navigation Hint
9.	You are now logged into Supplier Portal.	Welcome, Liz Smith ⑦
10.	To navigate to the **Home** page click on the home icon, or City of Chattanooga seal.	
11.	Click on the **Supplier Portal** button.	Supplier Portal

Step	Step Description	Navigation Hint
12.	Click the **Manage Profile** link on the Tasks menu on the left-hand side. (You may have to scroll down to see it.)	**Company Profile** • Manage Profile
13.	You are now on the **Company Profile** page.	Company Profile
14.	Generally, the City requests that you fill in as much information as possible. Click the **Edit** button in the top right corner.	Edit Done
15.	A warning message appears: *"Making edits will create a change request for the profile. Do you want to continue?"* Click **Yes**.	⚠ Warning ✕ POZ-2130390Making edits will create a change request for the profile. Do you want to continue? Yes No
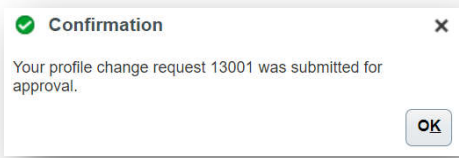
Organization Details

Step	Step Description	Navigation Hint
16.	On the **Organization Details** tab review the information.	**Organization Details** Tax Identifiers Addresses
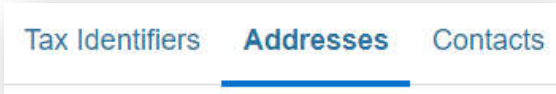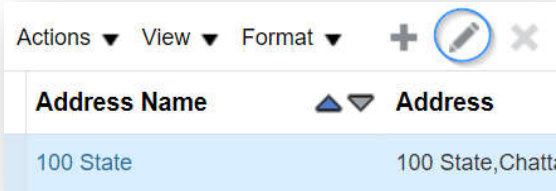
Step	Step Description	Navigation Hint
17.	Update as much information as possible. Click **Save**.	Save
18.	Click on the **Tax Identifiers** tab.	Organization Details **Tax Identifiers** Addresses
19.	Update as much information as possible. Click **Save**.	Save
20.	If all changes are complete enter **Change Description**.	Change Description
21.	Click **Review Changes** button. Review change summary.	Review Changes
22.	If additional changes need to be made click **Edit.** Return to previous steps.	Edit Submit Cancel

Step	Step Description	Navigation Hint
23.	If changes are accurate click **Submit**.	Edit **Submit** Cancel
24.	Review **Confirmation** message. Click **OK**.	✔ Confirmation ✕ Your profile change request 13001 was submitted for approval. OK
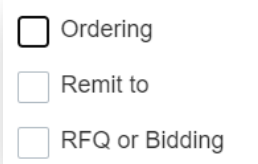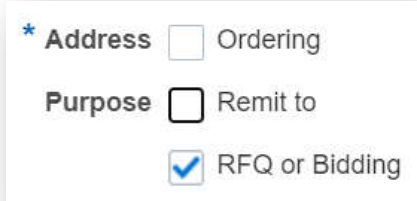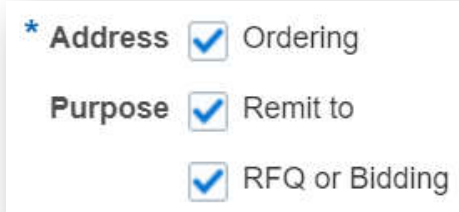
Addresses

Step	Step Description	Navigation Hint
25.	Click the **Addresses** tab.	Tax Identifiers **Addresses** Contacts
26.	To review and existing address Click the **row** to highlight it. Click the **pencil** icon.	Actions ▾ View ▾ Format ▾ ➕ 🖉 ✕ Address Name ▲▽ Address 100 State 100 State,Chatta

Step	Step Description	Navigation Hint
27.	The **Edit Address** window is now visible.	Edit Address: 100 State
28.	Update as much address information as possible including phone, fax and email address.	
29.	Enter/Update **Address Name.** The address name should be the first 15 digits of the street address and the street name including spaces For example, if the street address is 399 McCallie Avenue, Chattanooga, 37402 the **Address Name** would be 399 McCallie.	* Address Name
30.	Update all address information.	* Country United States Address Line 1 100 State Street Address Line 2 Suite 201 City Chattanooga State TN Postal Code 37402 County Hamilton
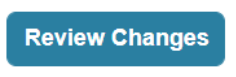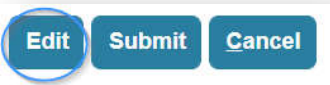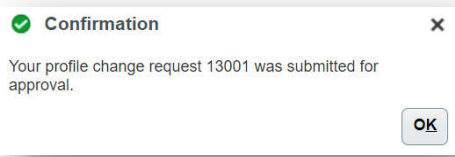
Step	Step Description	Navigation Hint
31.	**Address Purpose** Check all boxes that apply. **Ordering** is for Purchase Orders **Remit to** is for Payments **RFQ or Bidding** is for Bids/Responses	☐ Ordering ☐ Remit to ☐ RFQ or Bidding
32.	If you have never done business with the City of Chattanooga select **RFQ or Bidding** checkbox. This will enable you to respond to Bids and Solicitations.	* Address Purpose ☐ Ordering ☐ Remit to ☑ RFQ or Bidding
33.	If you have previously done business with the City of Chattanooga identify the purpose of this specific address. If your business only has 1 address or location for **Ordering, Remit to** (payments) and **RFQ or Bidding** you may select all 3 checkboxes.	* Address Purpose ☑ Ordering ☑ Remit to ☑ RFQ or Bidding
34.	Enter and/or update **Phone, Fax** and **Email** for this specific address.	Phone 1 ▼ 423 323-1000 Fax 1 ▼ 423 323-1111 Email hq@1234inc.com
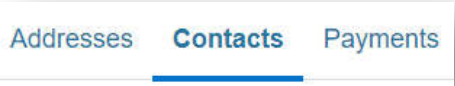
Step	Step Description	Navigation Hint
35.	Click **OK.**	OK
36.	To **Add an Address** click the + icon.	+
37.	The **Create Address** window is now visible.	Create Address
38.	Repeat steps to add address details for all your company addresses.	
39.	Update as much information as possible. Click **Save**.	Save
40.	If all changes are complete enter **Change Description**.	Change Description
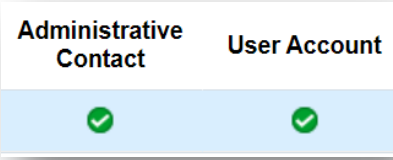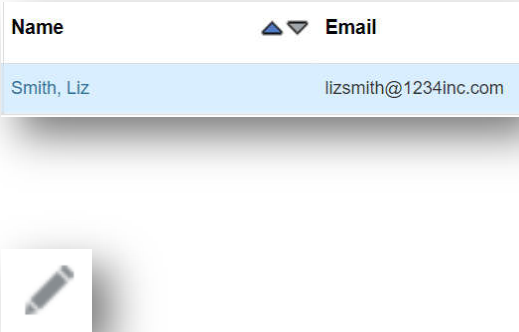
Step	Step Description	Navigation Hint
41.	Click **Review Changes** button. Review change summary.	Review Changes
42.	If additional changes need to be made click **Edit.** Return to previous steps.	Edit Submit Cancel
43.	If changes are accurate click **Submit**.	Edit Submit Cancel
44.	Review **Confirmation** message. Click **OK**.	✅ Confirmation ✕ Your profile change request 13001 was submitted for approval. OK
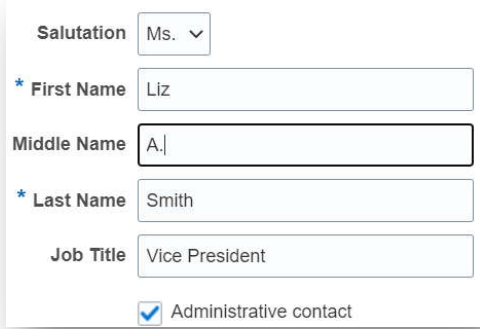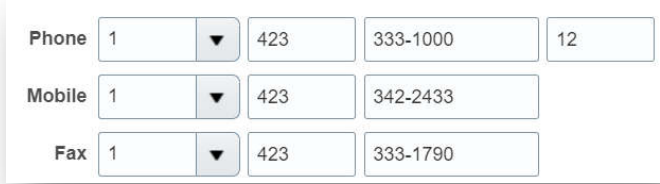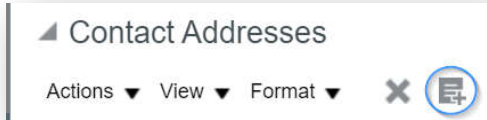
Contacts

Step	Step Description	Navigation Hint
45.	Click the **Contacts** tab.	Addresses **Contacts** Payments
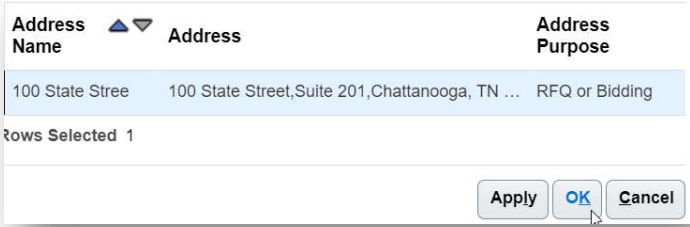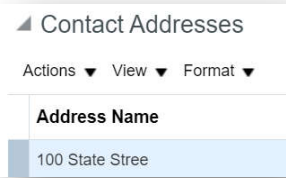
Step	Step Description	Navigation Hint
46.	Your contact will be visible.	**Name** ▲▼ **Email** Smith, Liz lizsmith@1234inc.com
47.	The first person to have registered for a user account for a company will be designated as the **Administrative Contact**.	**Administrative Contact** **User Account** ✅ ✅
48.	**Important:** Administrative contacts are responsible for maintaining the company profile. Administrative contacts are expected to update all aspects of the company profile regularly as changes occur regarding addresses, contacts, payment information, business classifications and products and services.	
49.	Highlight the row of the contact. Click the **Edit** icon.	**Name** ▲▼ **Email** Smith, Liz lizsmith@1234inc.com ✏️
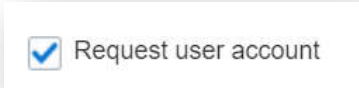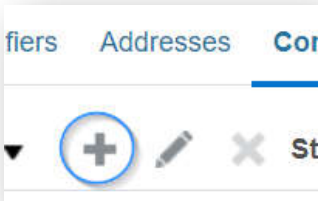
Step	Step Description	Navigation Hint
50.	Mandatory: Complete all Contact details. If adding a new contact check **Administrative contact** if you want the contact to be an Administrative contact.	
51.	Mandatory: Complete **Phone**, **Mobile** and/or **Fax** details.	
52.	Mandatory: Confirm or enter **Email** address.	
53.	Mandatory: In the **Contact Addresses** section click the **Select and Add** icon to associate and address to the contact. Every contact should be associated with an address.	
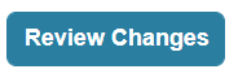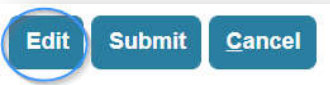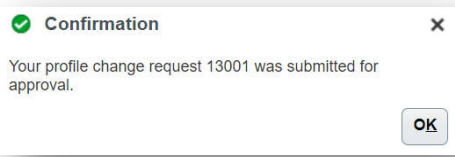
Step	Step Description	Navigation Hint
54.	The **Select and Add: Addresses** window is now visible.	Select and Add: Addresses
55.	Click the row of the desired address(es). Click **OK**. If the address is not available in the list return to instructions to add Addresses.	Address Name ▲▼ Address Address Purpose 100 State Stree 100 State Street,Suite 201,Chattanooga, TN … RFQ or Bidding Rows Selected 1 Apply OK Cancel
56.	The added address is now visible in the **Contact Addresses** section.	◢ Contact Addresses Actions ▾ View ▾ Format ▾ **Address Name** 100 State Stree
57.	View the **User Account** section.	◢ User Account

Step	Step Description	Navigation Hint
58.	For new contacts check the **Request User Account** checkbox. This will give the contact the ability to log into Supplier Portal. They will receive an email notifying them of their user id and log in instructions. This checkbox will not be visible for the original contact.	✓ Request user account
59.	**Do not** change any information or settings in **Roles** or **Data Access tabs.** Changes will impact users ability to log into Supplier Portal.	**Roles** Data Access
60.	On the **Edit Contact** window review the details. If complete, click **OK**.	
61.	You have returned to the **Edit Profile Change Request** page. Click the **+** icon to create additional contacts. Add contact details as instructed in previous steps.	fiers Addresses Cor ▼ (+) ✏ ✕ St
62.	If all changes are complete enter a description of changes made in the **Change Description** field.	**Change Description** [ ]
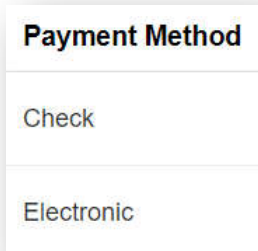
Step	Step Description	Navigation Hint
63.	Click **Review Changes** button. Review change summary.	Review Changes
64.	If additional changes need to be made click **Edit.** Return to previous steps.	Edit Submit Cancel
65.	If changes are accurate click **Submit**.	Edit Submit Cancel
66.	Review **Confirmation** message. Click **OK**.	✅ Confirmation ✕ Your profile change request 13001 was submitted for approval. OK
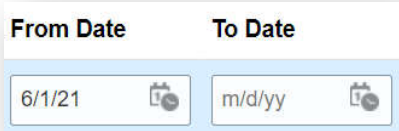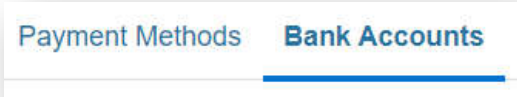
Payments

Step	Step Description	Navigation Hint
67.	This tab allows you to add/edit payment method and bank account information. Entering up to date Payment information is critical for Suppliers that have Active purchase orders and/or agreements with the City. The payment method and bank account you enter will dictate how you will receive payment from the City.	
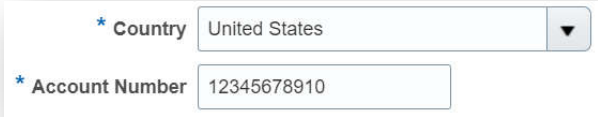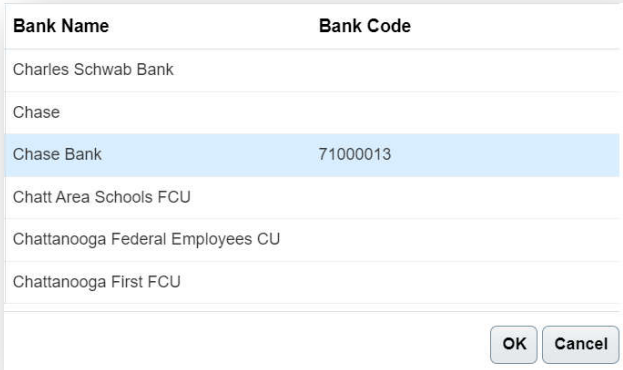
Step	Step Description	Navigation Hint
68.	Click on the **Payments** tab.	Contacts · **Payments** · Business Classifications
69.	Click on the **Payment Methods** tab.	**Payment Methods** · Bank Accounts
70.	Identify your desired default payment method. Options are: • Check • Electronic* (ACH aka direct deposit) *Payment via electronic payment method is faster than check payments.	**Payment Method** Check Electronic
71.	If you select **Electronic** payment method please complete and submit an [ACH Authorization Form.](#) The completed form should be returned via mail or, if preferred, send an email request for a secure link to ACH@Chattanooga.gov.	
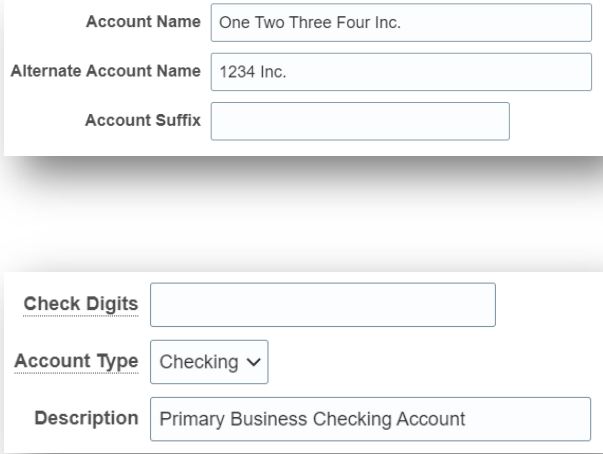
Step	Step Description	Navigation Hint
72.	Highlight the row of your desired default payment method. Click the **Set Default** icon. Only 1 default Payment Method is allowed.	
73.	Notice the green Default icon.	
74.	Add a **From Date** and/or **To Date** as applicable	
75.	Click the **Bank Accounts** tab.	
76.	To **Add** a Bank Account click the **+** icon.	
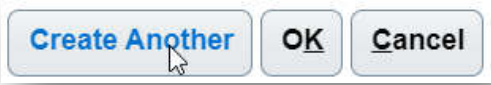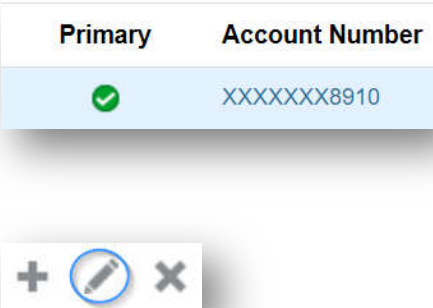
Step	Step Description	Navigation Hint
77.	The **Create Bank Account** window is now visible.	**Create Bank Account**
78.	In the **Country** field select the drop-down arrow. Enter your **Account Number**.	* Country United States * Account Number 12345678910
79.	In the **Bank Name** field select the drop-down arrow. Click **Search**. Enter your **Bank Name**. Click **Search**. Select your Bank from the search results. Click **OK**.	Bank Name Bank Code Charles Schwab Bank Chase Chase Bank 71000013 Chatt Area Schools FCU Chattanooga Federal Employees CU Chattanooga First FCU OK Cancel
80.	In the **Bank Branch** field select the drop-down arrow. Click **Search**. Enter your **Bank Branch name**. Click **Search**. Select your Bank Branch from the search results. Click **OK**.	
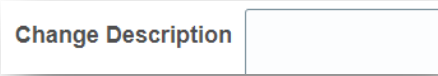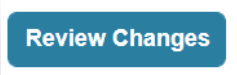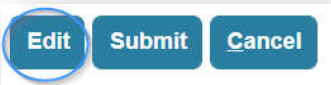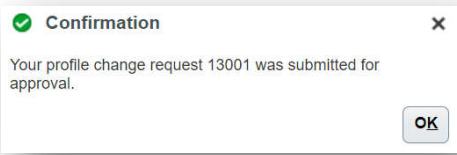
Step	Step Description	Navigation Hint
81.	The **From Date** will default to the date this Bank Account was created in Supplier Portal. Enter an **Inactive On** date as applicable.	From Date 6/17/21 Inactive On m/d/yy
82.	Leave the IBAN field blank.	IBAN
83.	Select the currency from the drop-down list.	Currency USD
84.	In the **Additional Information** section complete the fields as necessary to identify the bank account.	Account Name One Two Three Four Inc. Alternate Account Name 1234 Inc. Account Suffix Check Digits Account Type Checking Description Primary Business Checking Account
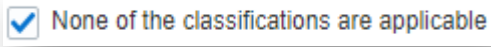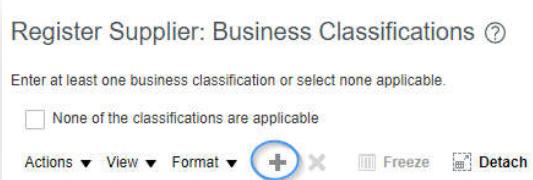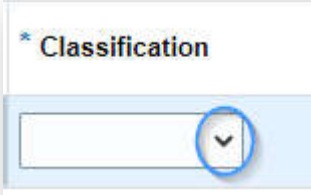
Step	Step Description	Navigation Hint
85.	Click **Create Another** to add another bank account. Repeat the instructions to add a bank account.	
86.	When bank account details are complete click **OK**.	
87.	**EDIT AN EXISTING BANK ACCOUNT** Click the row of the bank account to edit. Click the **Edit** icon	
88.	Update the necessary fields. Click **OK** when complete.	
89.	**DELETE AN EXISTING BANK ACCOUNT** Click the row of the bank account to delete. Click the **X** icon.	
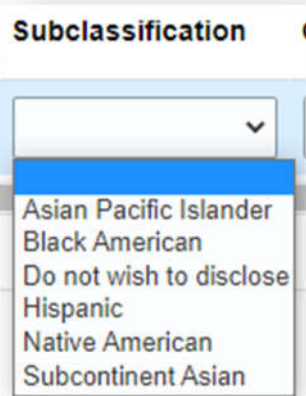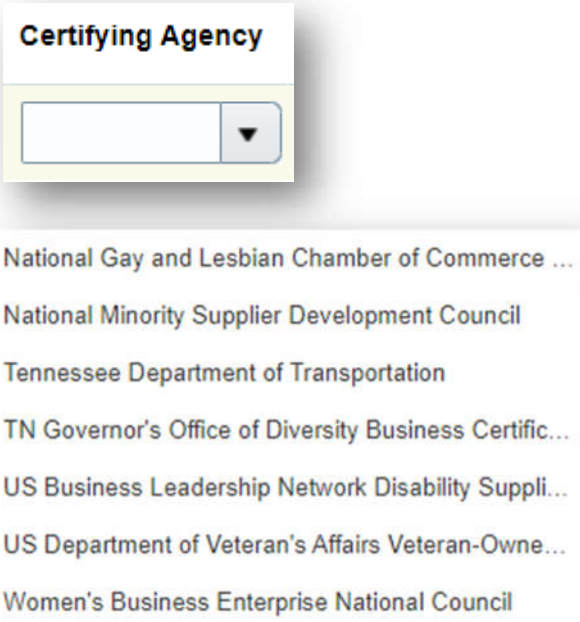
Step	Step Description	Navigation Hint
90.	If all changes are complete enter a description of changes made in the **Change Description** field.	**Change Description**
91.	Click **Review Changes** button. Review change summary.	Review Changes
92.	If additional changes need to be made click **Edit.** Return to previous steps.	Edit Submit Cancel
93.	If changes are accurate click **Submit**.	Edit Submit Cancel
94.	Review **Confirmation** message. Click **OK**.	✓ Confirmation ✕ Your profile change request 13001 was submitted for approval. OK
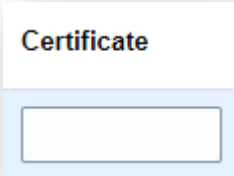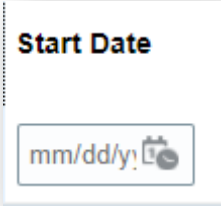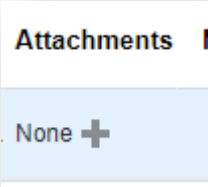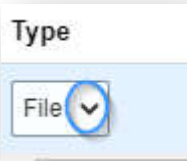
Business Classifications

Step	Step Description	Navigation Hint
95.	The following Business Classifications are tracked by the [City's Minority and Women-Owned Business Enterprise (MWOBE) Program](#).	Disabled Owned Business Enterprise LGBTQE Owned Business Enterprise Local Minority Owned Business Enterprise Service-Disabled Veteran Owned Business Enterprise Small Business Veteran Owned Business Enterprise Women Owned Business Enterprise
96.	If None of the Classifications are applicable to your company/organization, select the **None of the classifications are applicable** check box. Otherwise, click the **Add Row** button.	✔ None of the classifications are applicable Register Supplier: Business Classifications ⊘ Enter at least one business classification or select none applicable. ☐ None of the classifications are applicable Actions ▼ View ▼ Format ▼ ➕ ✕ Freeze Detach
97.	Click the ***Classification** drop-down arrow.	* Classification ⌄
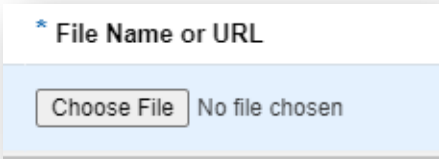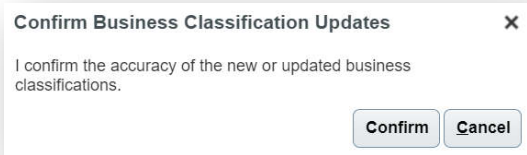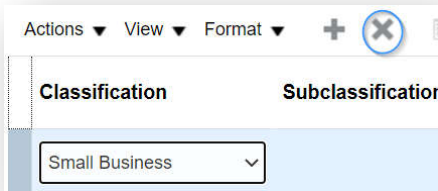
Step	Step Description	Navigation Hint
98.	Select any applicable **Classifications.**	Disabled Owned Business Enterprise LGBTQE Owned Business Enterprise Local Minority Owned Business Enterprise Service-Disabled Veteran Owned Business Enterprise Small Business Veteran Owned Business Enterprise Women Owned Business Enterprise
99.	For Minority Owned Business Enterprises subclassification information is requested. Click the **Subclassification** drop-down arrow. Select appropriate subclassification from the drop-down list.	**Subclassification** Asian Pacific Islander Black American Do not wish to disclose Hispanic Native American Subcontinent Asian
100.	Click the **Certifying Agency** drop-down arrow. If the Certifying Agency is not in the list of values, select Other.	**Certifying Agency** National Gay and Lesbian Chamber of Commerce … National Minority Supplier Development Council Tennessee Department of Transportation TN Governor's Office of Diversity Business Certific… US Business Leadership Network Disability Suppli… US Department of Veteran's Affairs Veteran-Owne… Women's Business Enterprise National Council
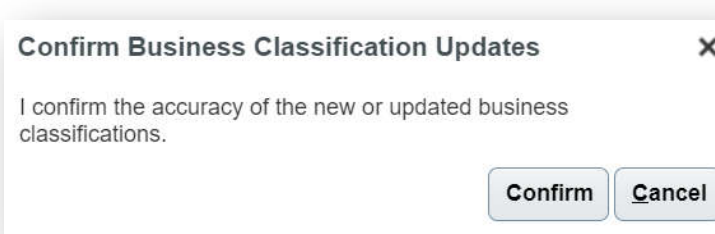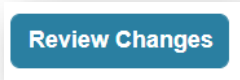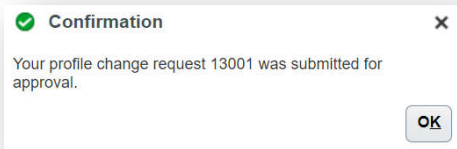
Step	Step Description	Navigation Hint
101.	Click in the **Certificate** field. Enter the type of Certificate in Certificate field.	Certificate
102.	Enter the Start Date of your certification. Click in the field and enter the **Start Date**.	Start Date mm/dd/y
103.	Enter the **Expiration Date** of your certification. Click in the field and enter the **Expiration Date.**	Expiration Date mm/dd/y
104.	Attach a copy of your certification and any relevant documents by clicking the **Add (+)** icon under attachments.	Attachments None +
105.	Click on the file dropdown arrow and select the appropriate **File Type**.	Type File
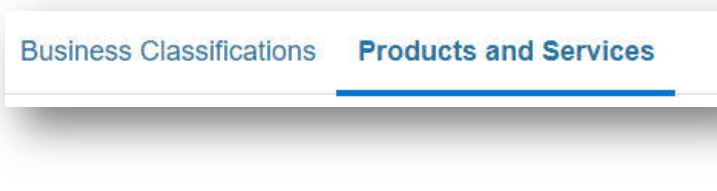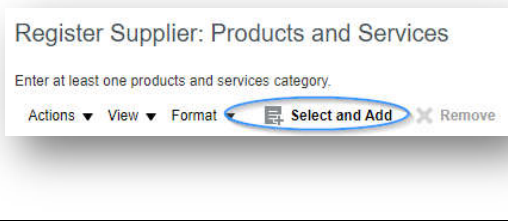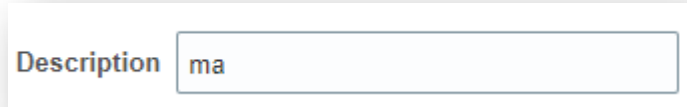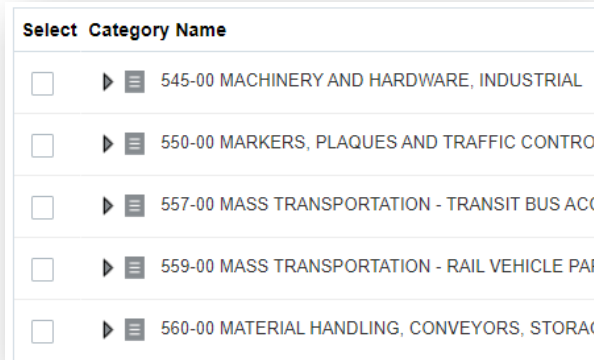
Step	Step Description	Navigation Hint
106.	Click the **Choose File** button	* File Name or URL Choose File No file chosen
107.	Click the **Ok** button. Click **Save** button.	OK Save
108.	Click **Confirm** to confirm the accuracy of the new or updated business classifications.	**Confirm Business Classification Updates** ✕ I confirm the accuracy of the new or updated business classifications. Confirm Cancel
109.	**DELETE BUSINESS CLASSIFICATION** Click the row of the classification you would like to delete. Click the **X** icon.	Actions ▼ View ▼ Format ▼ ✚ ⊗ **Classification** **Subclassification** Small Business ⌄
110.	If all changes are complete enter a description of changes made in the **Change Description** field.	**Change Description**
111.	Click **Save** button.	Save
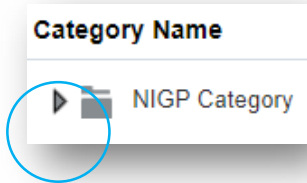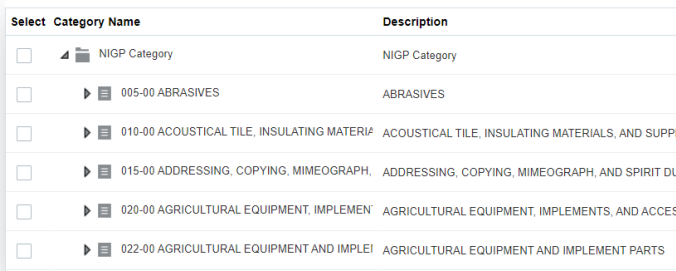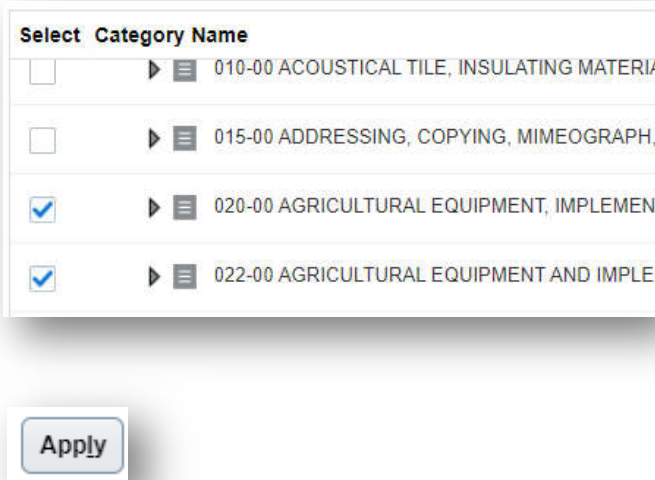
Step	Step Description	Navigation Hint
112.	Click **Confirm** to confirm the accuracy of the new or updated business classifications.	**Confirm Business Classification Updates** ✕ I confirm the accuracy of the new or updated business classifications. Confirm Cancel
113.	Click **Review Changes** button. Review change summary.	Review Changes
114.	If additional changes need to be made click **Edit.** Return to previous steps.	Edit Submit Cancel
115.	If changes are accurate click **Submit**.	Edit Submit Cancel
116.	Review **Confirmation** message. Click **OK**.	✔ Confirmation ✕ Your profile change request 13001 was submitted for approval. OK
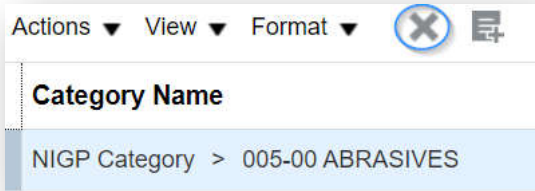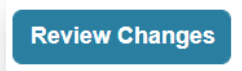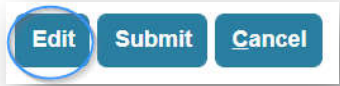
Products and Services

Step	Step Description	Navigation Hint
117.	The City would like to know what products and services your company or organization provides. If the City's buying needs match your products and services you may be directly notified of solicitation opportunities.	
118.	Click on the **Products and Services** tab.	Business Classifications **Products and Services**
119.	Click the **Select and Add** button to add Product and Services.	Register Supplier: Products and Services Enter at least one products and services category. Actions ▼ View ▼ Format ▼ 🗐 Select and Add ✕ Remove
120.	Use the **Description** field to search using keywords. Enter a few characters or use general keywords for best results. Click the **Search** button. Results will appear based on your search.	Description ma
121.	To select a product or service to add to your company or organization profile click the appropriate checkbox(es). *Select as many products/services categories that will fit your business.* The City will use your selections to invite you to solicitations that match.	Select Category Name ☐ ▶ 🗐 545-00 MACHINERY AND HARDWARE, INDUSTRIAL ☐ ▶ 🗐 550-00 MARKERS, PLAQUES AND TRAFFIC CONTRO ☐ ▶ 🗐 557-00 MASS TRANSPORTATION - TRANSIT BUS AC ☐ ▶ 🗐 559-00 MASS TRANSPORTATION - RAIL VEHICLE PA ☐ ▶ 🗐 560-00 MATERIAL HANDLING, CONVEYORS, STORAG

Step	Step Description	Navigation Hint
122.	Click **Apply** to add and to search for additional categories.	
123.	You may also search by clicking the small triangle next to NIGP Category.	
124.	The Categories and Descriptions will be listed in alphabetical order. Scroll up/down to view.	
125.	To select a product or service to add to your company/organization profile click the appropriate checkbox(es). Select as many product/service categories. The City will use your selections to invite you to solicitations that match. Click **Apply** to add and to search for additional categories.	

Step	Step Description	Navigation Hint
126.	Click the **OK** button.	OK
127.	**DELETE PRODUCTS AND SERVICES** Click the row of the product or services you would like to delete. Click the **X** icon.	Actions ▼ View ▼ Format ▼ ⊗ ≣ **Category Name** NIGP Category > 005-00 ABRASIVES
128.	If all changes are complete enter a description of changes made in the **Change Description** field.	Change Description [ ]
129.	Click **Review Changes** button. Review change summary.	Review Changes
130.	If additional changes need to be made click **Edit.** Return to previous steps.	Edit Submit Cancel
131.	If changes are accurate click **Submit**.	Edit Submit Cancel

Step	Step Description	Navigation Hint
132.	Review **Confirmation** message. Click **OK**.	**Confirmation** ✕ Your profile change request 13001 was submitted for approval. OK

Supplier Portal Support

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