TTX Supplier Portal
User Guide

eSHIFT

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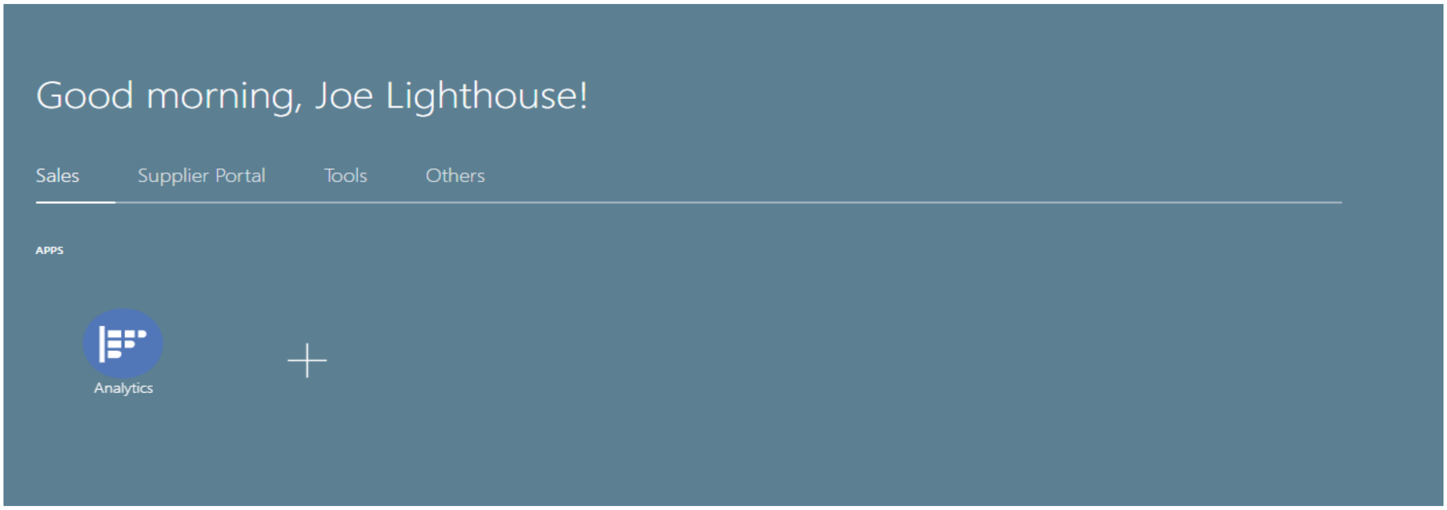
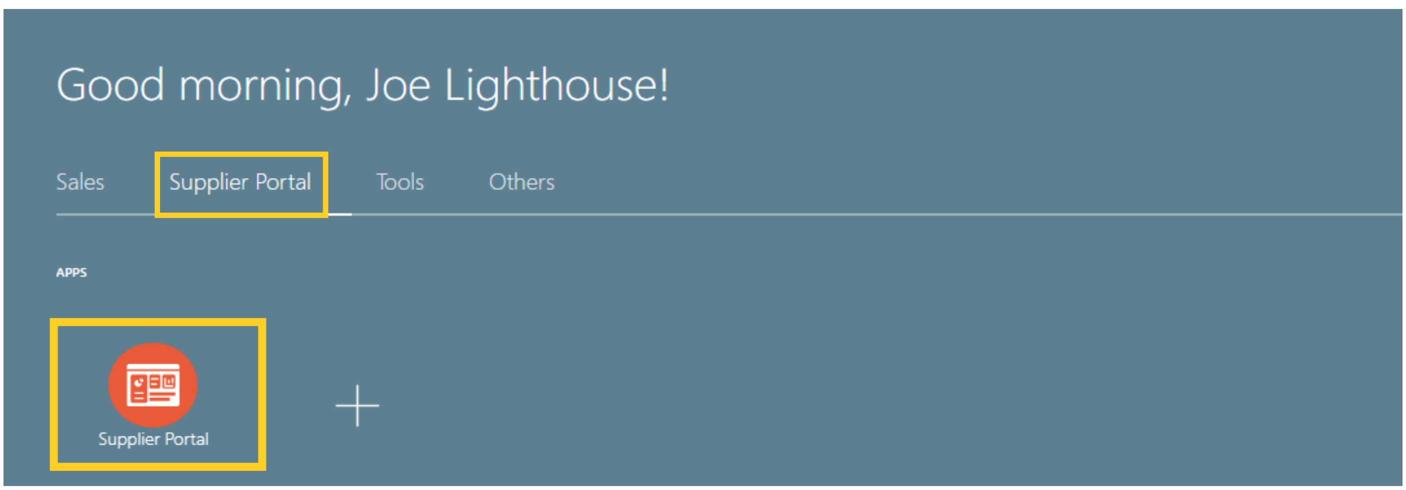
View Purchase Orders

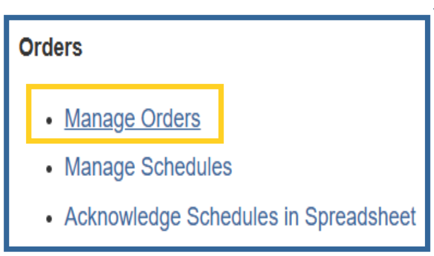
1) First, log into the TTX Supplier Portal. Please note your username is your email address.

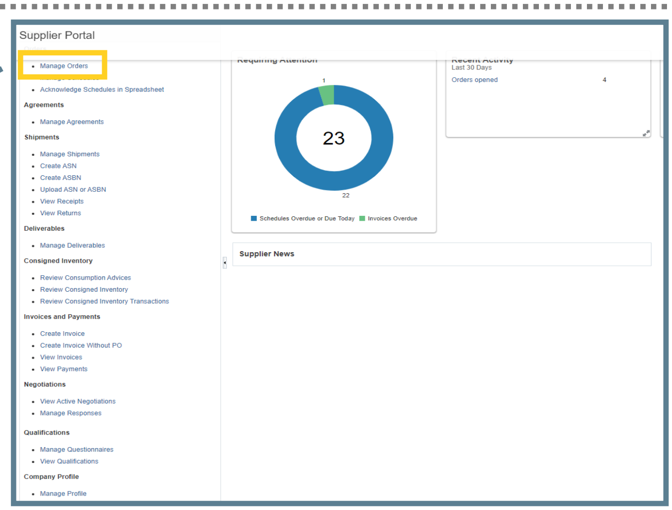


2) Under the **Supplier Portal** tab, select the **Supplier Portal** Application.



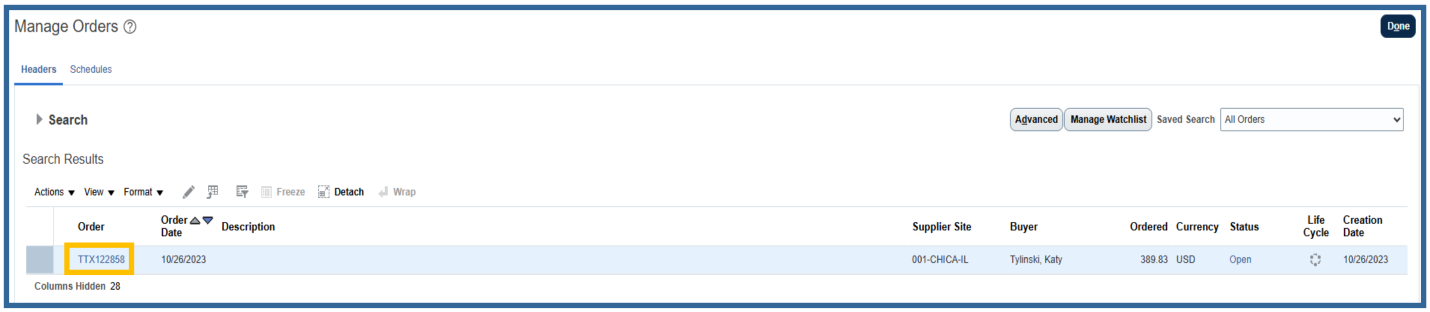
3) Under the **Orders** subcategory within the **Tasks** pane, click Manage Orders.



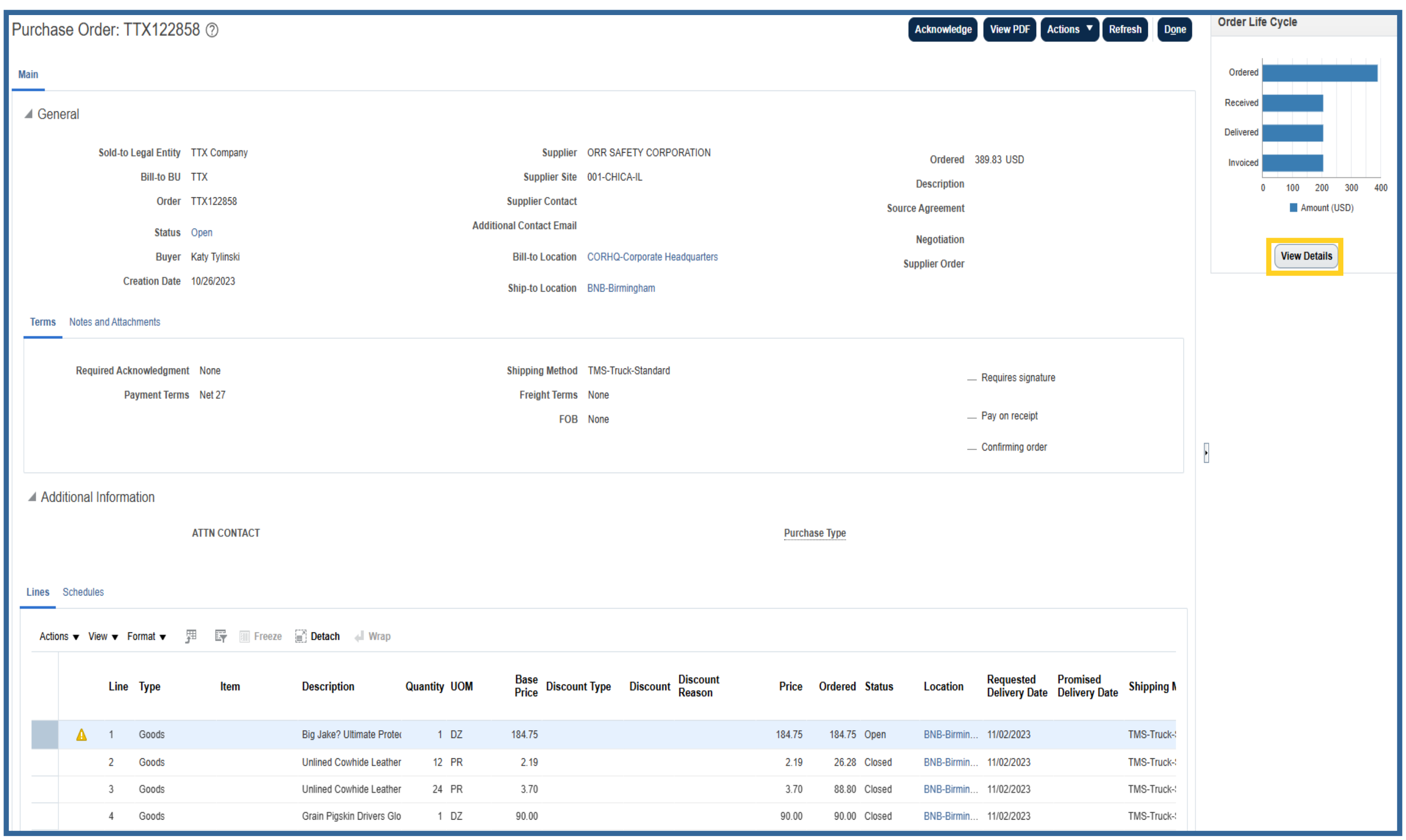


4) Enter the PO number in the **Order** text field and then click **Search**.

5) Under **Search Results**, click the order number.



6) From this screen, you can view high level PO details. Click the **View Details** button under the **Order Life Cycle** bar graph to dive into the posted good receipts and matched invoices.



7) From this screen, the posted receipts and matched invoices can be viewed individually.

Ordered = total amount of order

Shipped = N/A

Received = total amount of goods receipts posted to PO

Delivered = total amount confirmed delivered

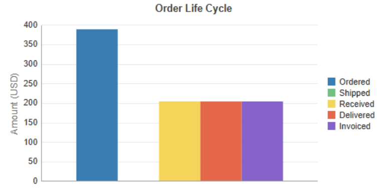
Invoiced = total amount invoiced

Order Life Cycle: TTX122858

Done

Sold-to Legal Entity	TTX Company
Order	TTX122858
Supplier	ORR SAFETY CORPORATION
Supplier Site	001-CHICA-IL
Supplier Contact	
Ordered	389.83 USD

Order Life Cycle



Ordered	389.83 USD
Shipped	0.00 USD
Received	205.08 USD
Delivered	205.08 USD
Invoiced	205.08 USD

◢ In-Transit Shipments

Actions ▾ View ▾ Format ▾ Freeze Detach Wrap

Shipment	Ship Date	Tracking Number	Packing Slip	Expected Receipt Date	Shipped	Carrier	Bill of Lading

No results found.

Columns Hidden 2

◢ Receipts

Actions ▾ View ▾ Format ▾ Freeze Detach Wrap

Receipt	Receipt Date	Shipment	Ship Date	Packing Slip	Returned	Received	Delivered	Invoiced	Open to Invoice
1079	11/09/2023 9:...				0.00	90.00	90.00	0.00	0.00
1078	11/09/2023 9:...				0.00	88.80	88.80	0.00	0.00
1077	11/09/2023 9:...				0.00	26.28	26.28	0.00	0.00

Columns Hidden 3

◢ Invoices

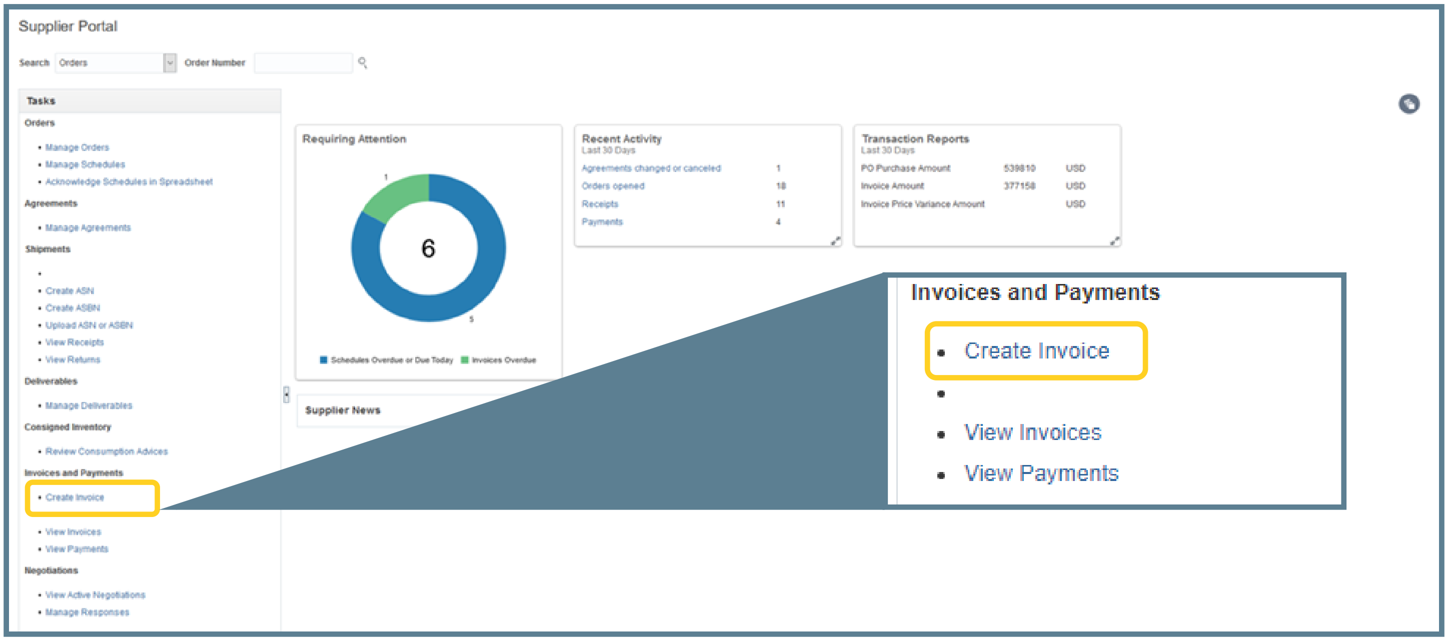
Actions ▾ View ▾ Format ▾ Freeze Detach Wrap

Invoice	Invoice Date	Status	Invoice Total	Paid	Matched Amount	Receipt	Packing Slip
905843439	11/08/2023	Validated	225.58	225.58	205.08		

Columns Hidden 3

Creating an Invoice (With a Purchase Order)

1) Under the **Invoices and Payments** subcategory within the Tasks pane, click **Create Invoice.**



PLEASE PROCEED TO NEXT PAGE

2) Complete the invoice Header accordingly:

2a. In the ***Identifying PO** text field, enter the PO number or select it from the drop-down menu.

2b. ***Supplier Site** and **Supplier Tax Registration Number** should populate upon entering/selecting the ***Identifying PO.**

2c. From the **Remit-to Bank Account** drop-down menu, select your bank account to receive ACH payments. If it is not available, please contact **VendorRequests@ttx.com** to have your profile updated accordingly. Otherwise, payment will be issued via check to the address on file.

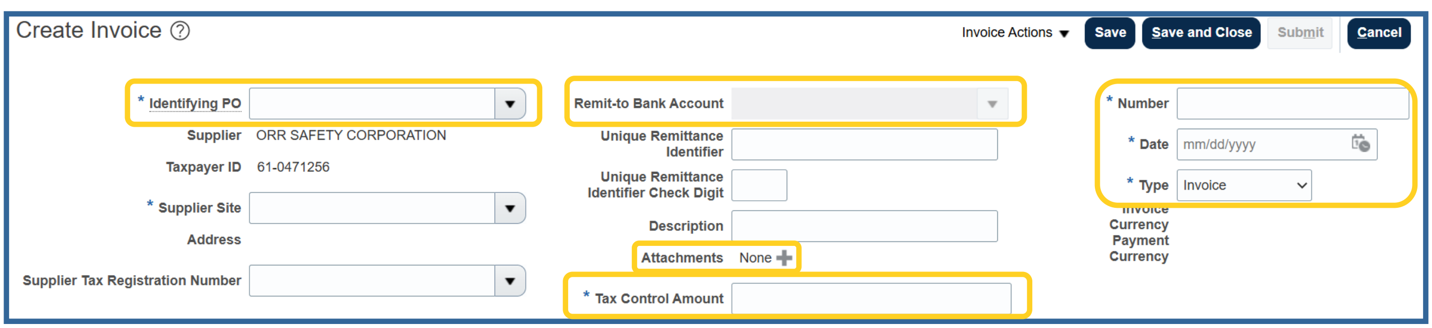
2d. To the right of **Attachments** where you see the word "**None**", click the plus sign. Then, click **Choose file** to attach a copy of the invoice.

2e. In the ***Tax Control Amount** text field, enter the total amount of tax charged on the invoice. (No tax = 0. Please do not leave blank.)

2f. In the ***Number** text field, enter the invoice number.

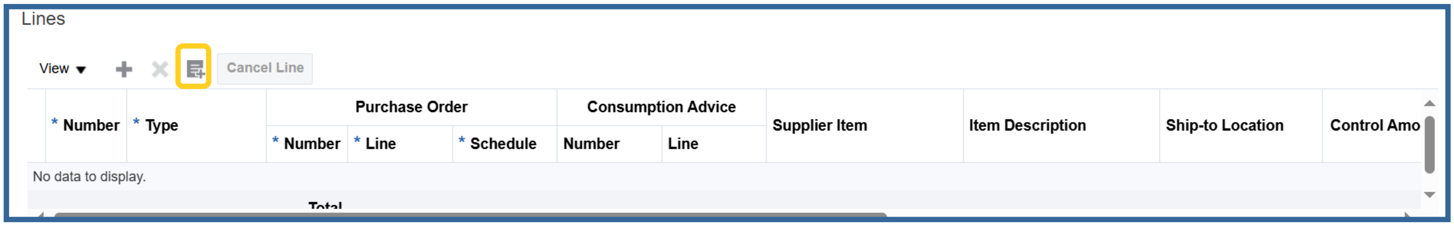
2g. In the ***Date** text field, enter the invoice date(not the current date).

2h. If you're submitting a credit memo, select "Credit memo" from the ***Type** drop-down menu.

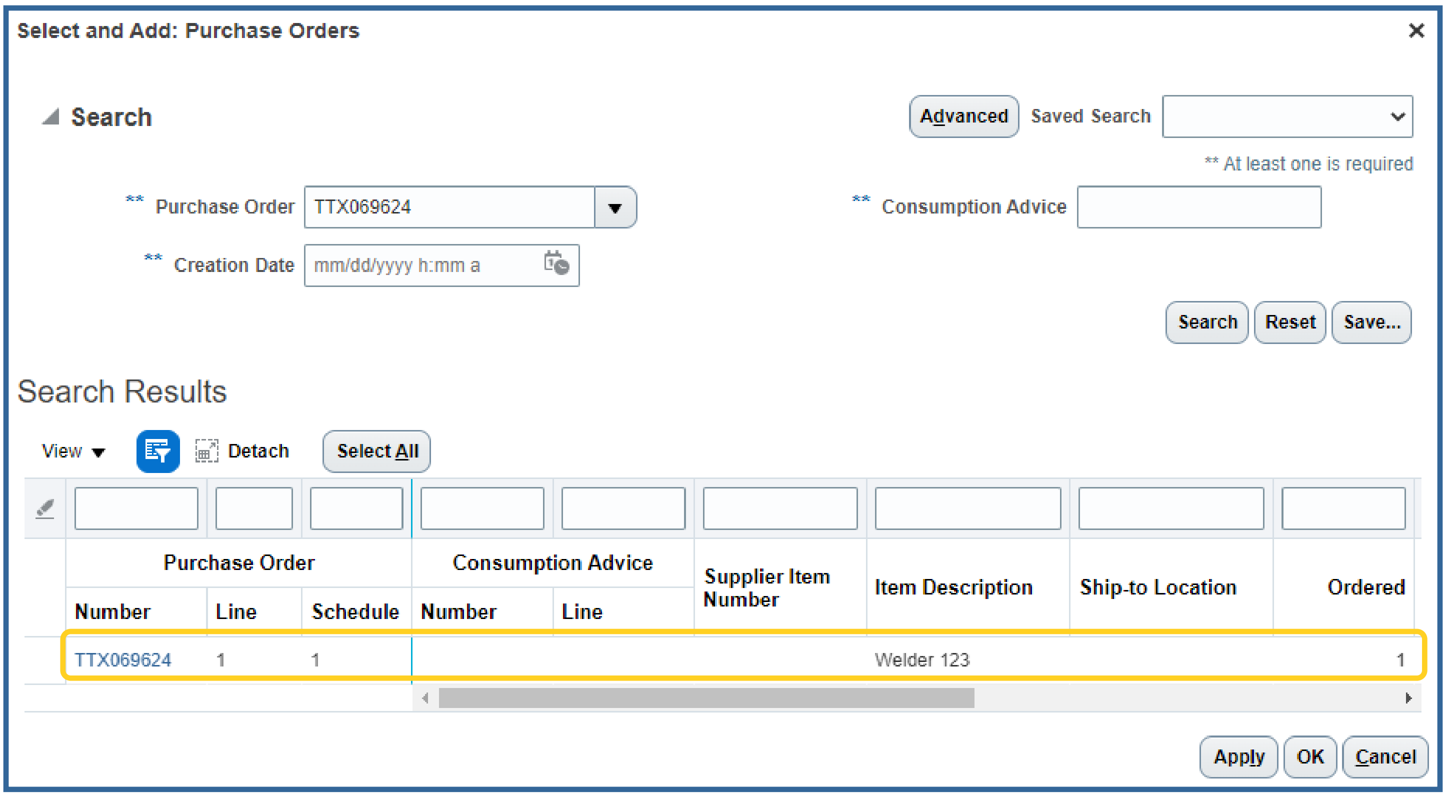


PLEASE DISREGARD CUSTOMER SECTION AND PROCEED TO LINES.

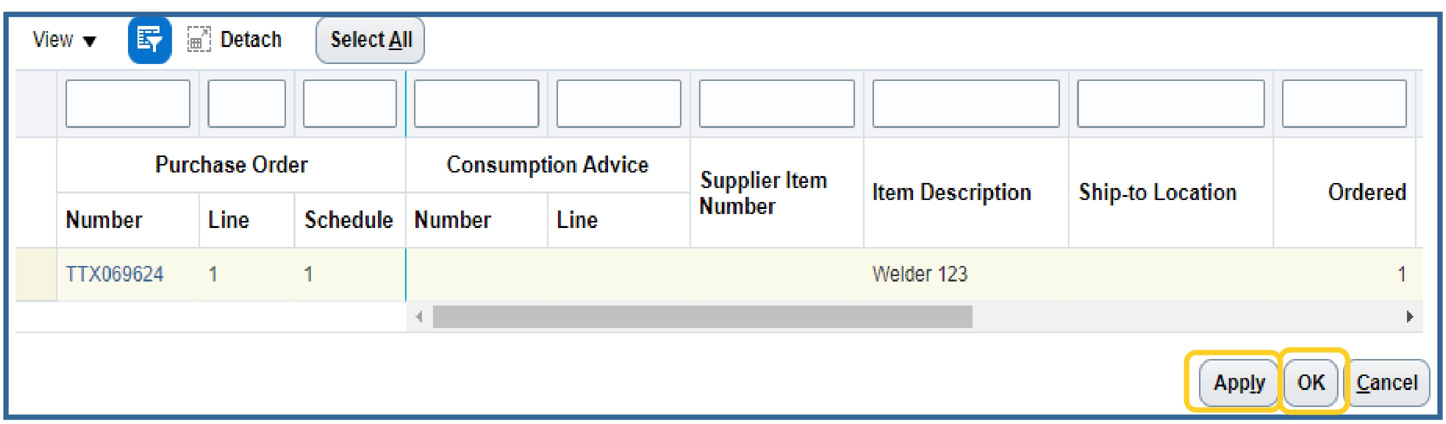
3) Under the **Lines** section, click the Select and Add icon.



4) Open PO lines will populate under **Search Results**. For each PO line you need for the invoice you're submitting, click any blank space along the line to select the row. (It should turn blue or yellow once selected.)



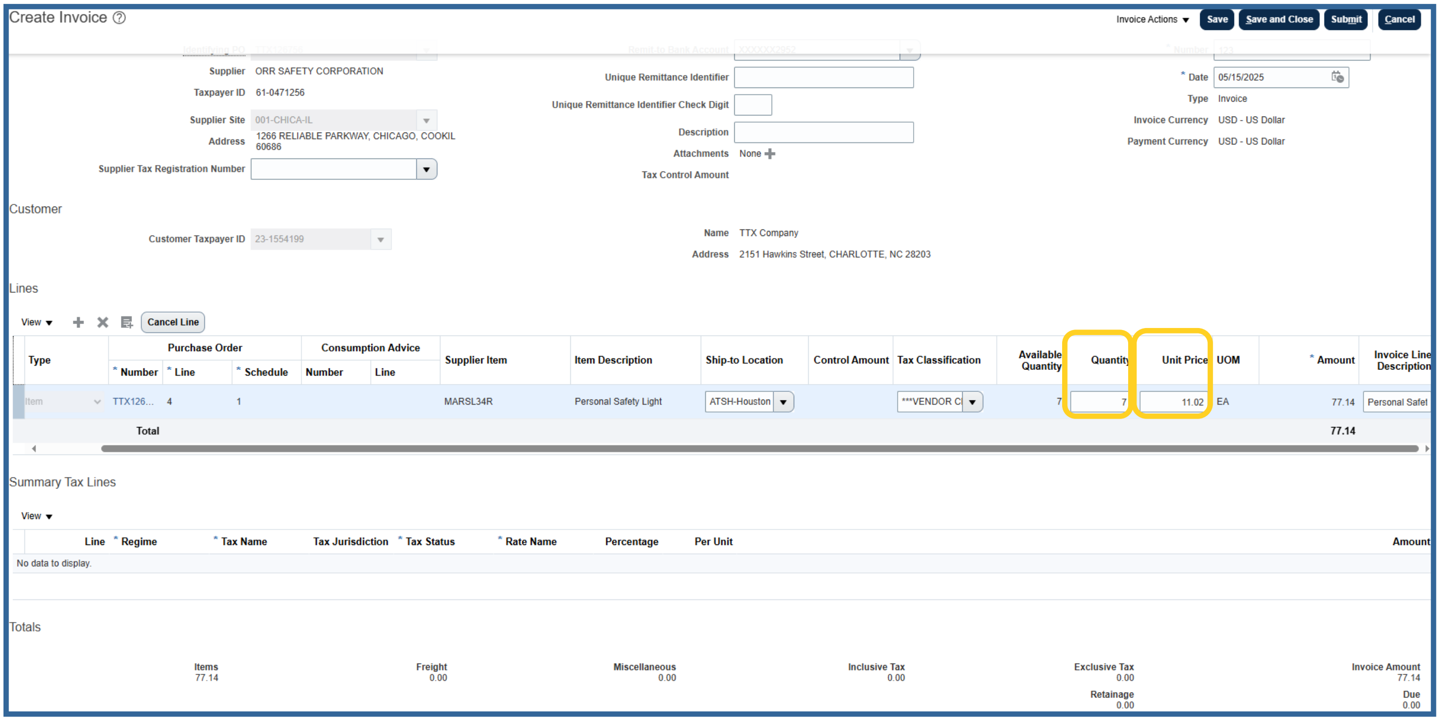
5) Click **Apply**, and then **OK** to proceed.



6) Review the **Quantity** and **Unit Price** text fields of the PO line(s) and make any necessary changes.

6a. Descriptions are optional.

6b. Leave **Tax Classification** as is.



7) To account for any shipping/handling fees, click the Add icon.

7a. Select **Freight** from the ***Type** drop-down menu.

7b. Enter the same **Ship-to Location** code as your PO line(s) or select it from drop-down menu.

7c. Enter the total amount of S&A fees charged on the invoice in the ***Amount** text field.

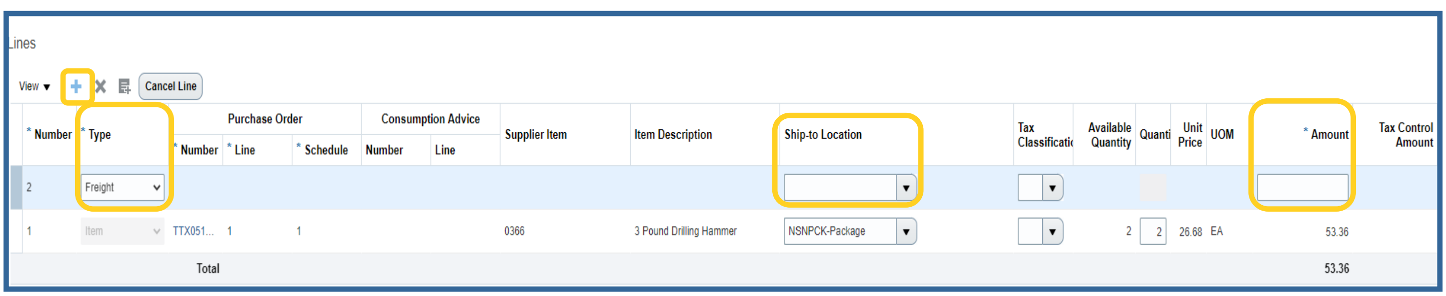
8) To account for any additional fees that are not on the PO, again click the Add icon.

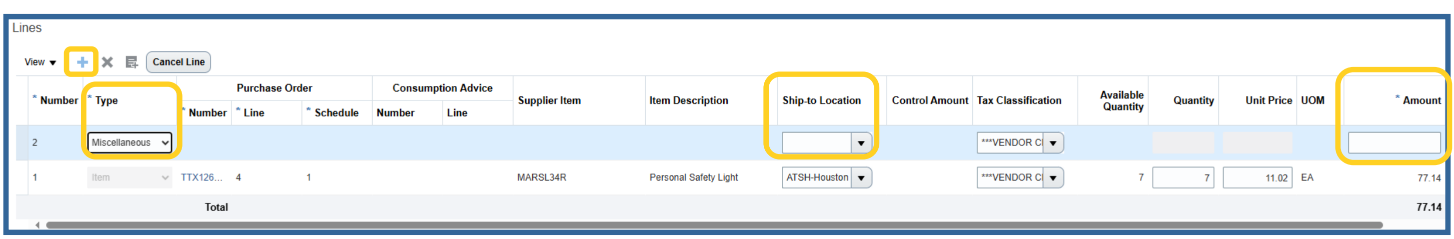
8a. Select **Miscellaneous** from the ***Type** drop-down menu.

8b. Enter the same **Ship-to Location** code as your PO line(s) or select it from drop-down menu.

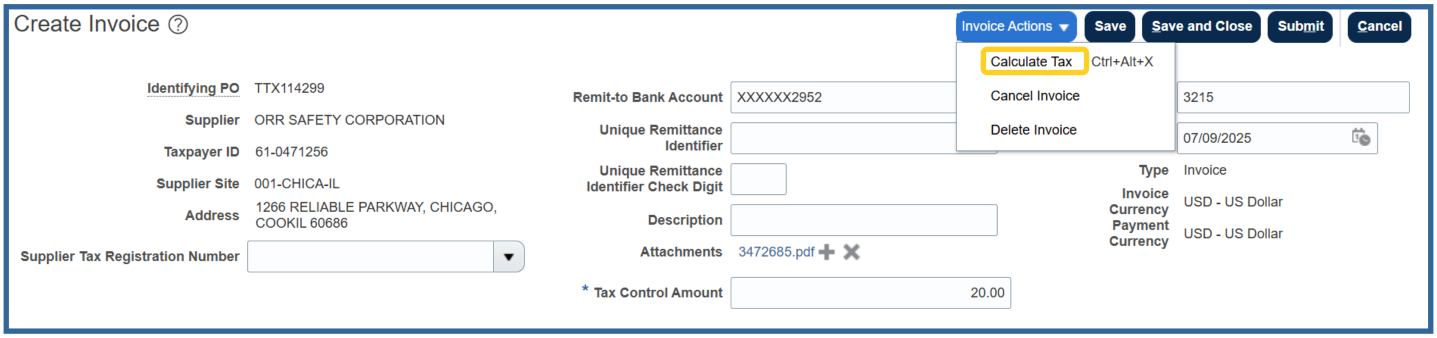
8c. Enter the total amount of S&A fees charged on the invoice in the ***Amount** text field.

Note**: Tax Classification** should be left blank in both instances.





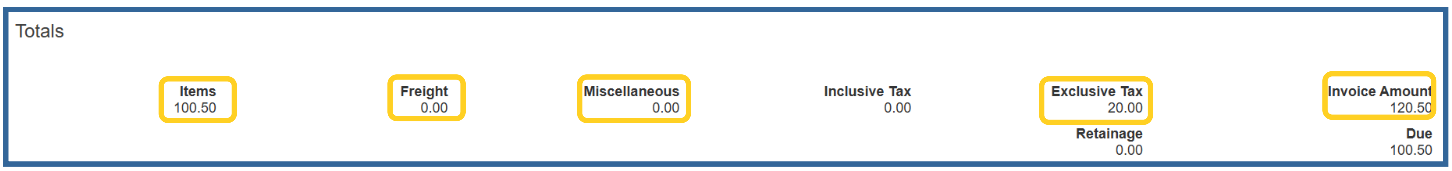
10) Click **Invoice Actions**, and then select **Calculate Tax** from the drop-down menu.



11) Review the **Totals** along the bottom of screen for accuracy.

11a. **Items**, **Freight**(if applicable), **Miscellaneous**(if applicable), and **Exclusive Tax** totals should equate to the correct **Invoice Amount**.

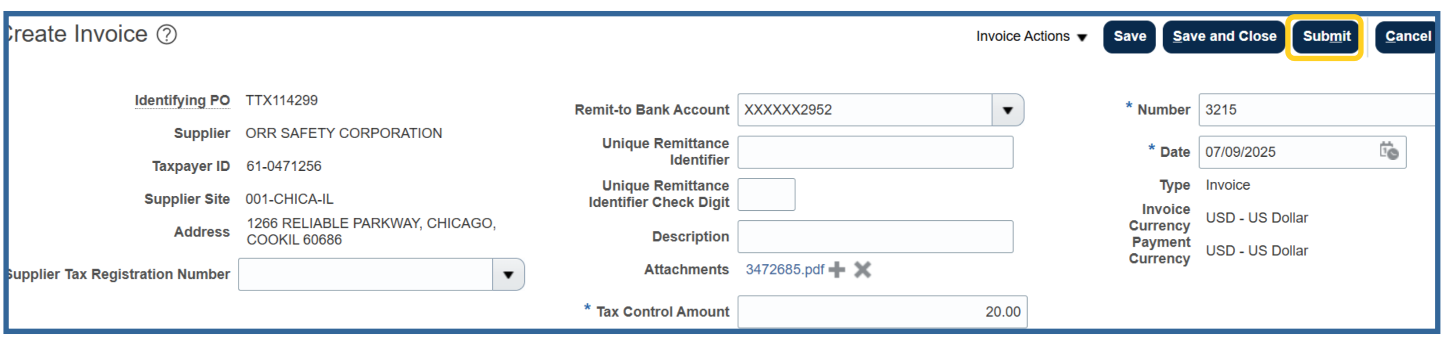
11b. Disregard all other totals. (It's ok if what's Due ≠ Invoice Amount.)

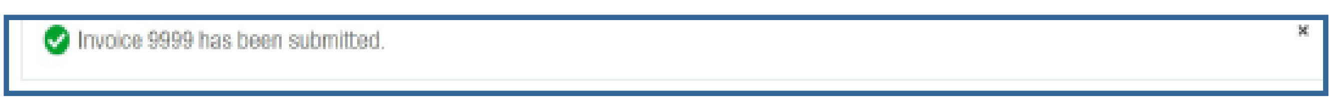


12) Click the **Submit** button.

12a. If successful, you'll receive a banner notification for confirmation.

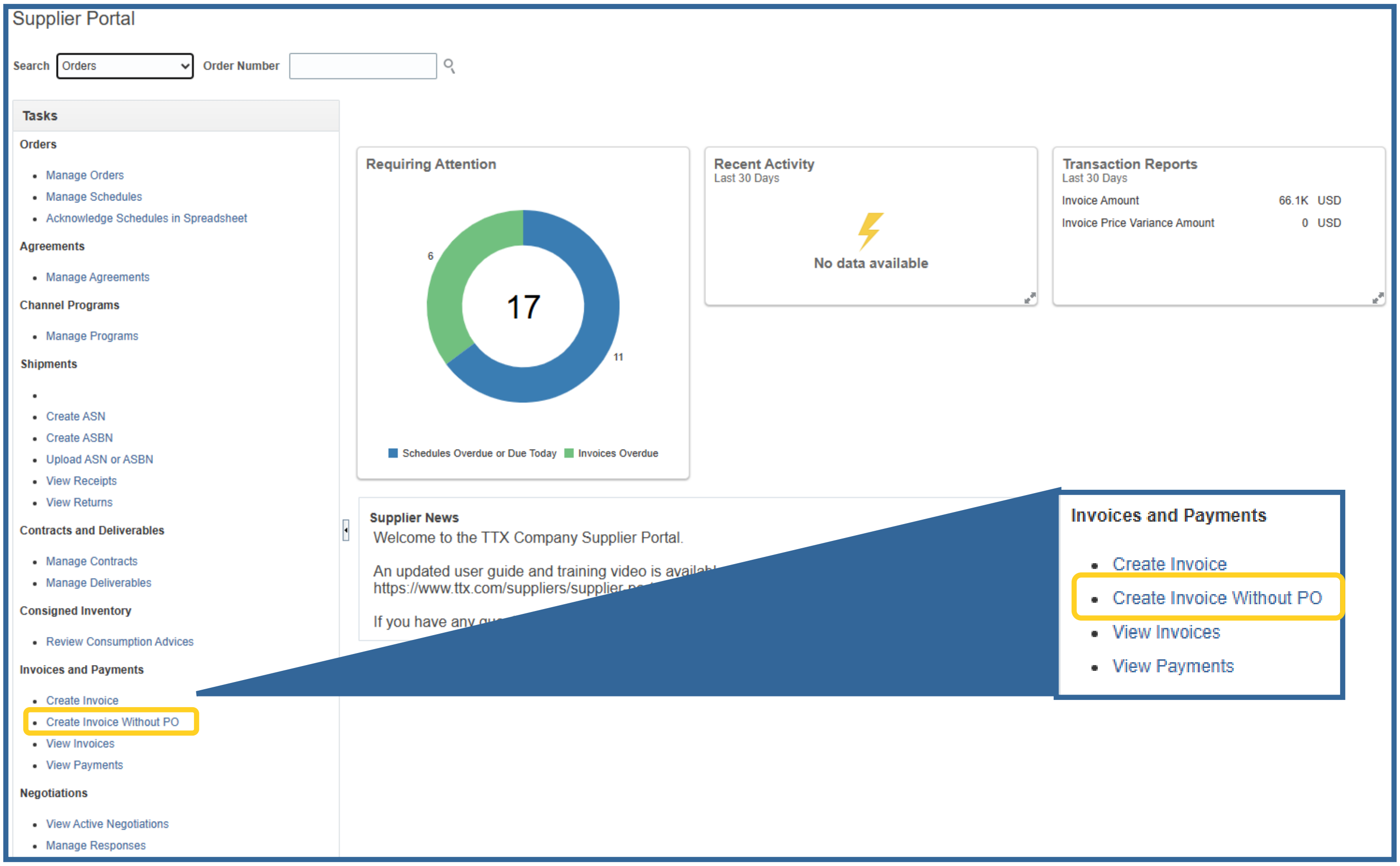
12b. **!!**Please be aware that clicking the **Save and Close** button puts the invoice in Incomplete status. Incomplete invoices will not process until they have been submitted.**!!**





Creating an Invoice Without a PO

1) Under the **Invoices and Payments** subcategory within the **Tasks** pane, click **Create Invoice Without PO.**



PROCEED TO NEXT PAGE

2) Complete the invoice Header accordingly:

****Supplier** and **Taxpayer ID** will already be populated. Only concern yourself with the text fields mentioned below.**

2a. From the ***Supplier Site** drop-down menu, select the site that provided the good and/or service. If it's not available for selection, contact **VendorRequests@ttx.com** to have the profile updated accordingly

2b. From the **Remit-to Bank Account** drop-down menu, select your bank account to receive ACH payments. If it's not available for selection, contact **VendorRequests@ttx.com** to have the profile updated accordingly. Otherwise, payment will be issued via check to the address on file.

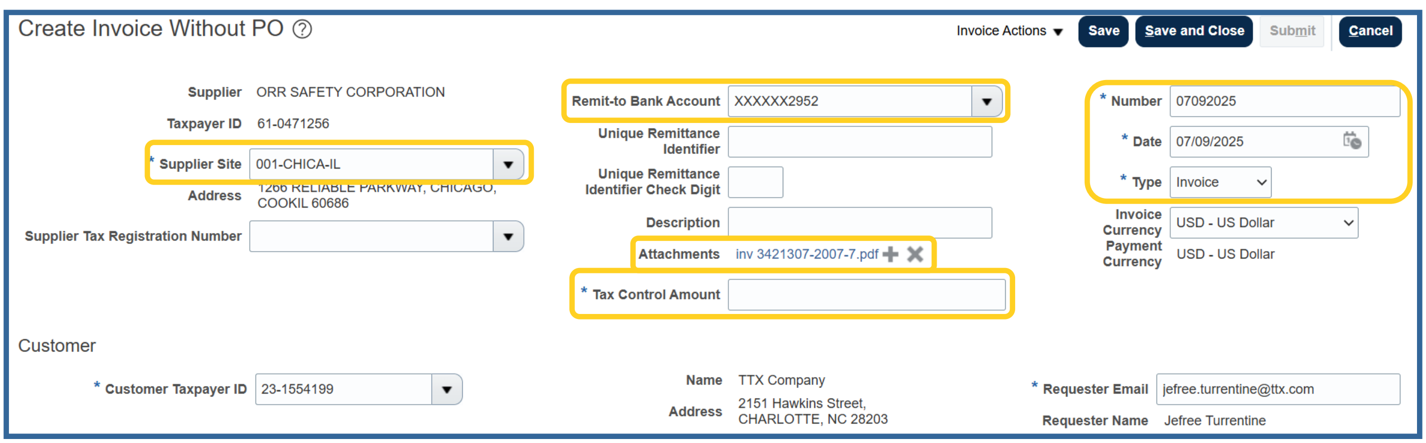
2c. To the right of **Attachments** where you see the word "**None**", click the plus sign. Then click **Choose file** to attach a copy of the invoice.

2d. In the ***Tax Control Amount** text field, enter the total amount of taxes charged on the invoice. (No tax = 0. Please do not leave blank.)

2e. Enter the invoice number in the ***Number** text field.

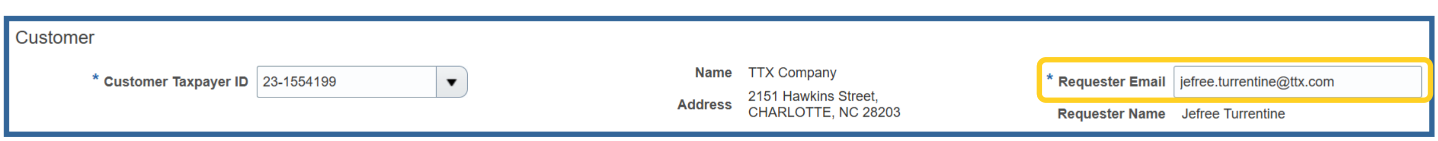
2f. Enter the invoice date(not the current date) in the ***Date** text field.

2g. If you're submitting a credit memo, select "Credit memo" from the ***Type** drop-down menu.



3) Whomever your TTX contact is for the order you're invoicing is what we refer to as the Requester. Enter their email address in the ***Requester Email** text field of the **Customer** section. (TTX email format = First-name.Lastname@ttx.com)

3a. Please disregard all other text fields in the Customer section.



4) Under the **Lines** section, click the Add icon(+) and then complete the line that populates as follows:

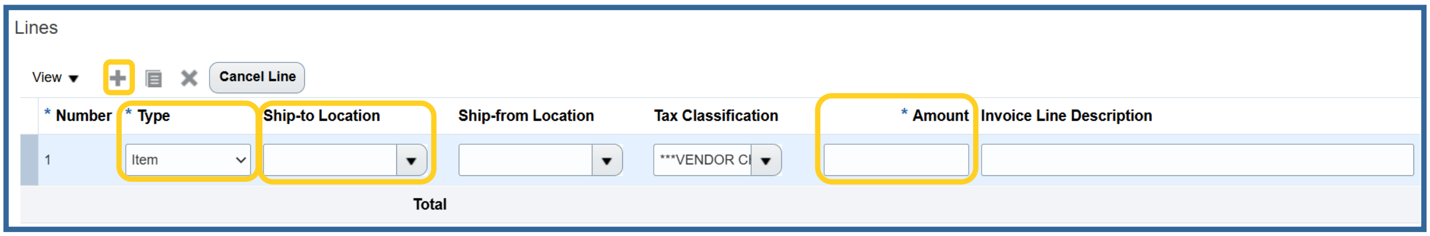
4a. Under the *__Type__ column, select **Item** from the drop-down menu for all goods and/or services(if not already populated).

4b. Your **Ship-to Location** coincides with the ship-to address on the invoice. Please utilize the FMO Contact Detail spreadsheet to determine the correct code to enter or select from the drop-down menu. All corporate invoices should have a Ship-to Location of **CORNC**.

4c. Disregard Ship-from Location and Tax Classification columns.

4d. In the *__Amount__ text field, enter the total of the invoice minus any taxes. (Please do not break out charges. All but tax should be entered on a single Item line.)

4e. **Description** is optional.



5) To account for any shipping/handling fees, click the Add icon.

5a. Select **Freight** from the *__Type__ drop-down menu.

5b. Enter the same **Ship-to Location** code as your PO line(s) or select it from drop-down menu.

5c. Enter the total amount of S&A fees charged on the invoice in the *__Amount__ text field.

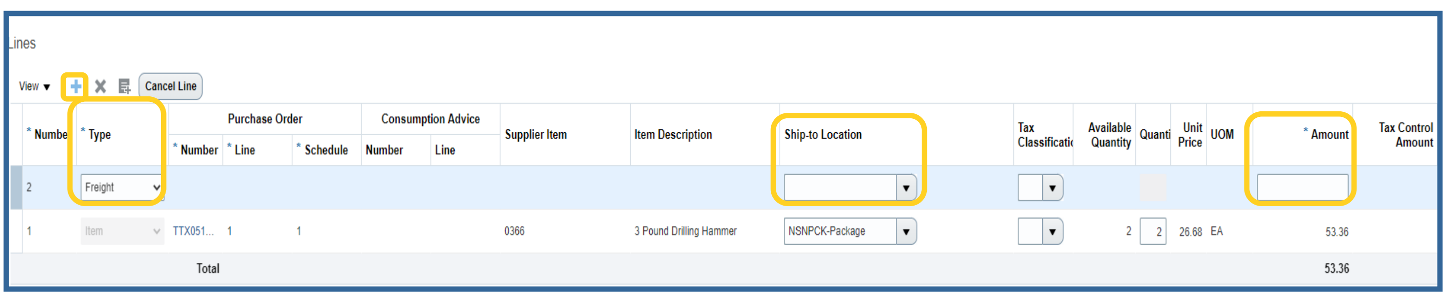
6) To account for any additional fees that are not on the PO, again click the Add icon.

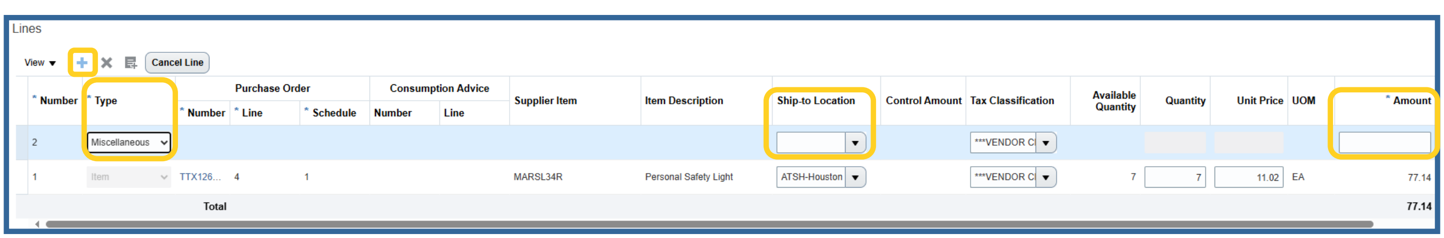
6a. Select **Miscellaneous** from the *__Type__ drop-down menu.

6b. Enter the same **Ship-to Location** code as your PO line(s) or select it from drop-down menu.

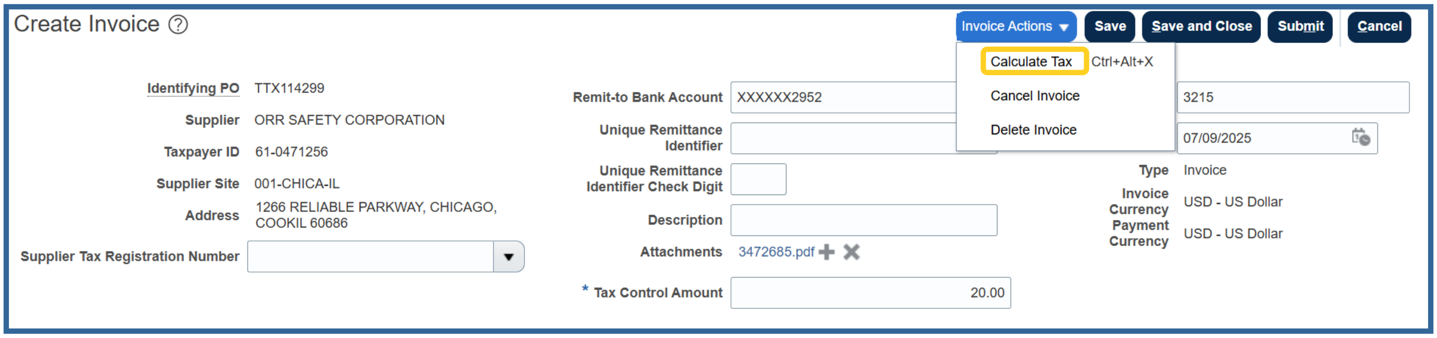
6c. Enter the total amount of S&A fees charged on the invoice in the *__Amount__ text field.

Note: **Tax Classification** should be left blank in both instances.





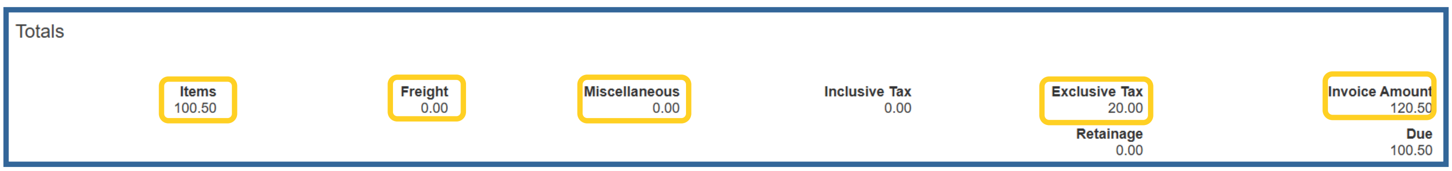
7) Click **Invoice Actions**, and then select **Calculate Tax** from the drop-down menu.



8) Review the **Totals** along the bottom of screen for accuracy.

8a. **Items**, **Freight**(if applicable), **Miscellaneous**(if applicable), and **Exclusive Tax** totals should equate to the correct **Invoice Amount**.

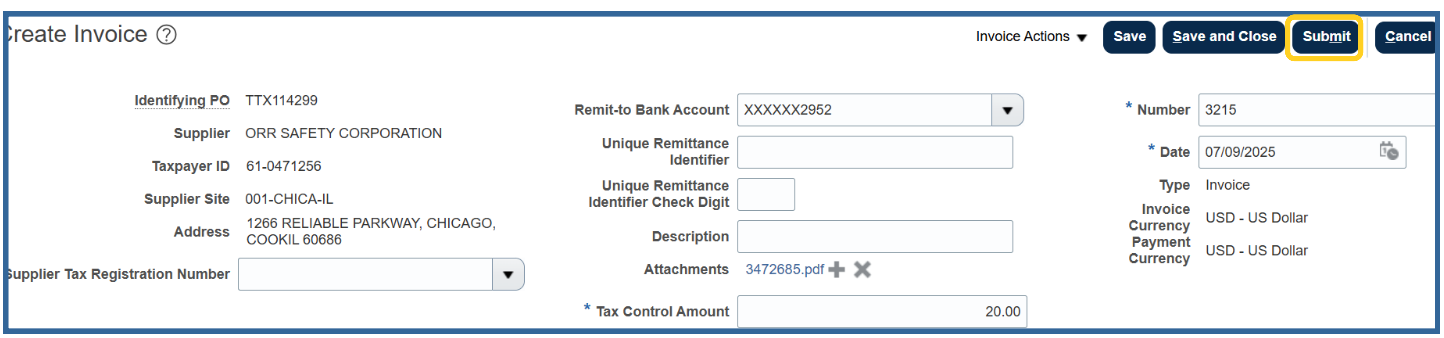
8b. Disregard all other totals. (It's ok if what's Due ≠ Invoice Amount.)

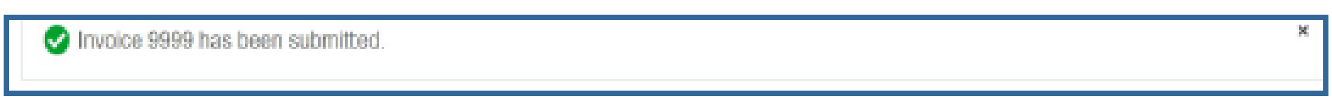


9) Click the **Submit** button.

9a. If successful, you'll receive a banner notification for confirmation.

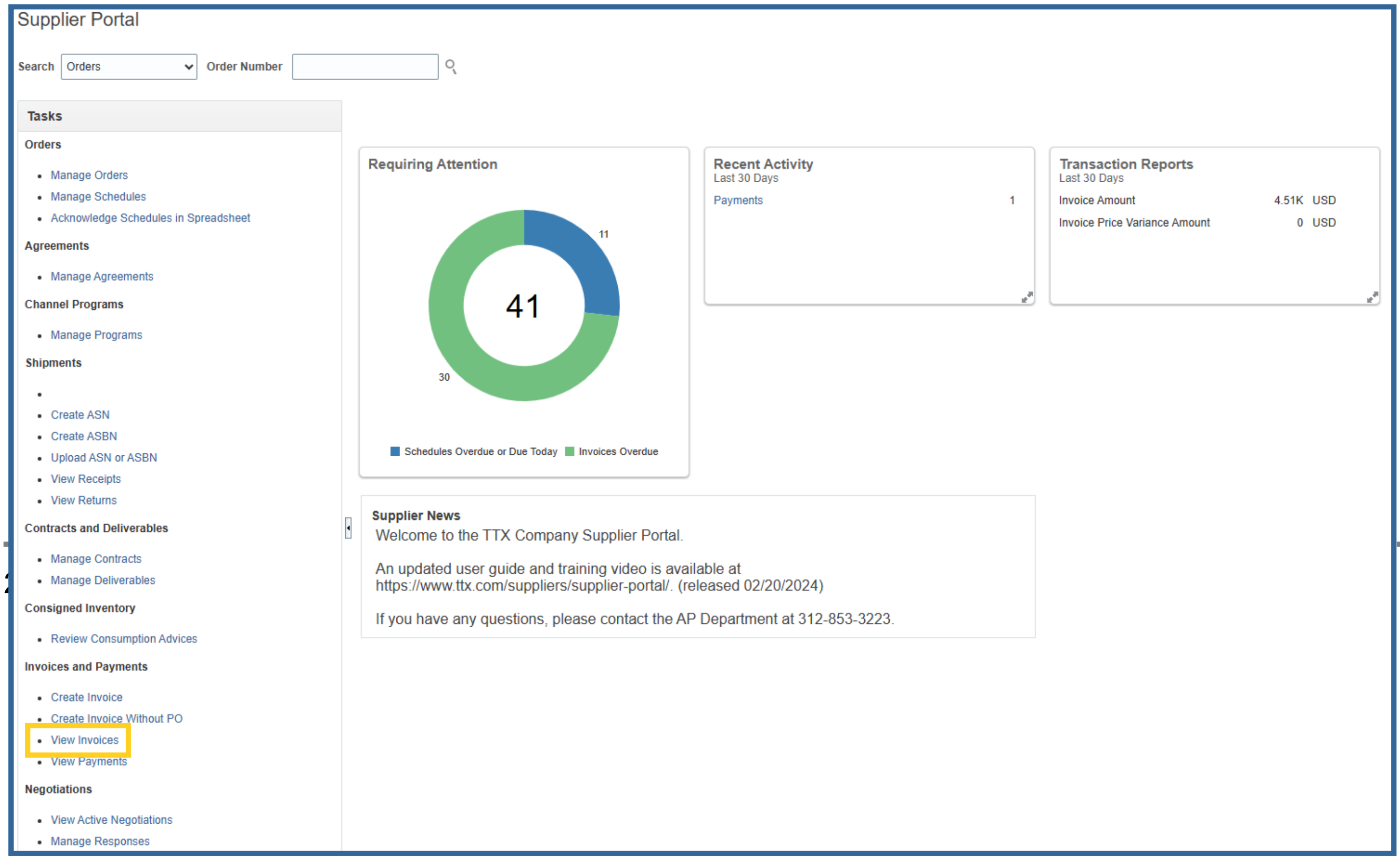
9b. **!!**Please be aware that clicking the **Save and Close** button puts the invoice in Incomplete status. Incomplete invoices will not process until they have been submitted.**!!**





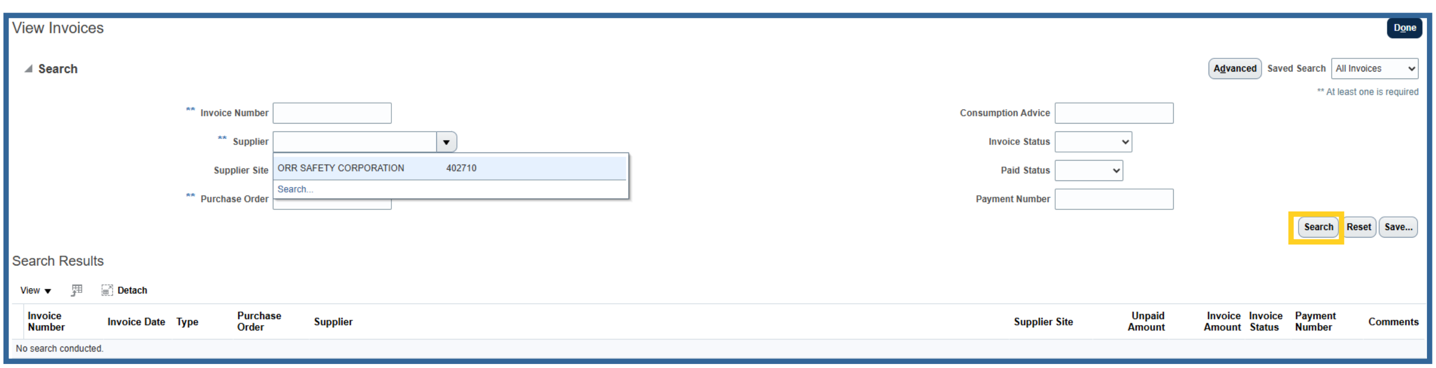
View Invoices

1) Under the **Invoices and Payments subcategory within the Tasks pane**, click **View Invoices.**

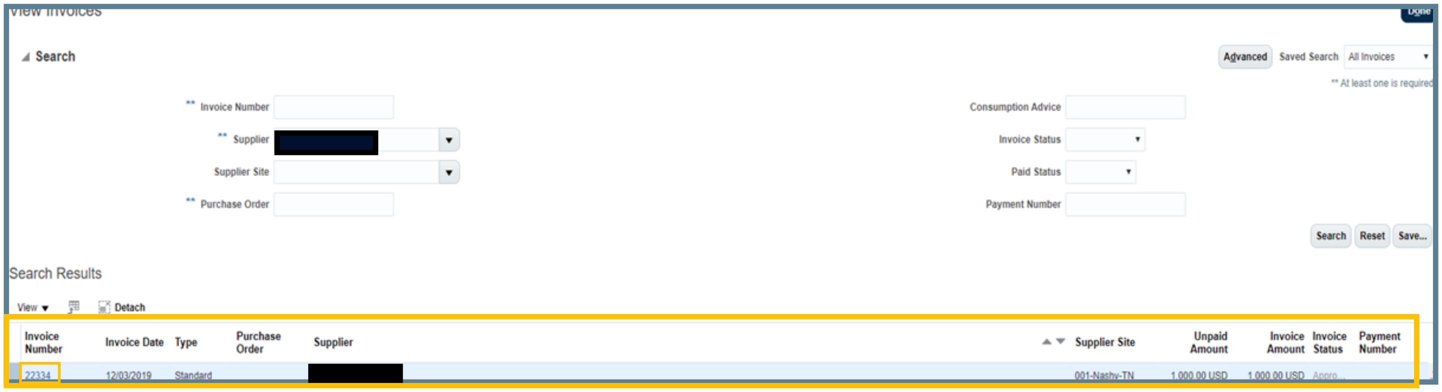


2) Feel free to search your invoices by any of the text fields shown on this screen. They are designed to be used as filters for you to easily locate and view invoices. For example:

- Enter an ****Invoice Number** and then click **Search** to view a specific invoice**.**
- Select your company's name from the ****Supplier** drop-down menu and then click **Search** to view all invoices in the system for the supplier.
- Enter a ****Purchase Order** number and then click **Search** to populate all invoices in the system associated with that PO.



3) Under **Search Results**, click any invoice number to open it up and view details beyond what's already showing(Invoice Date, Type, Purchase Order, Supplier, etc).



Status Legend:

⇒ **Approved**—fully approved and ready for payment

⇒ **In process**— invoice making its way through approval workflow

⇒ **On hold**—missing information required for processing. For PO invoices, this means the goods receipt is missing(Contact PO Requester). For non-PO invoices, this means the distribution is missing(Contact assigned Requester).

⇒ **Incomplete**—needs to be completed and submitted or canceled

⇒ **Pending import**—-in assigned requester's queue awaiting coding and approval into the system

⇒ **Pending payment**—payment in process, will pay out when due

⇒ **Canceled**(self explanatory)

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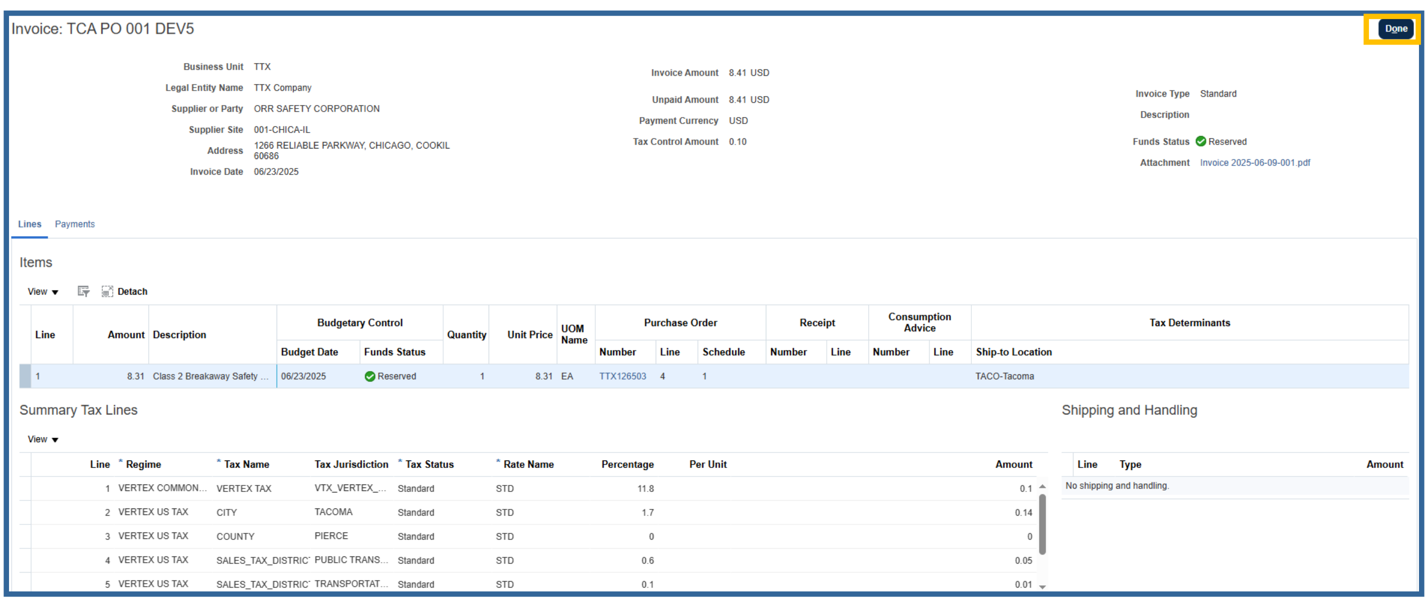
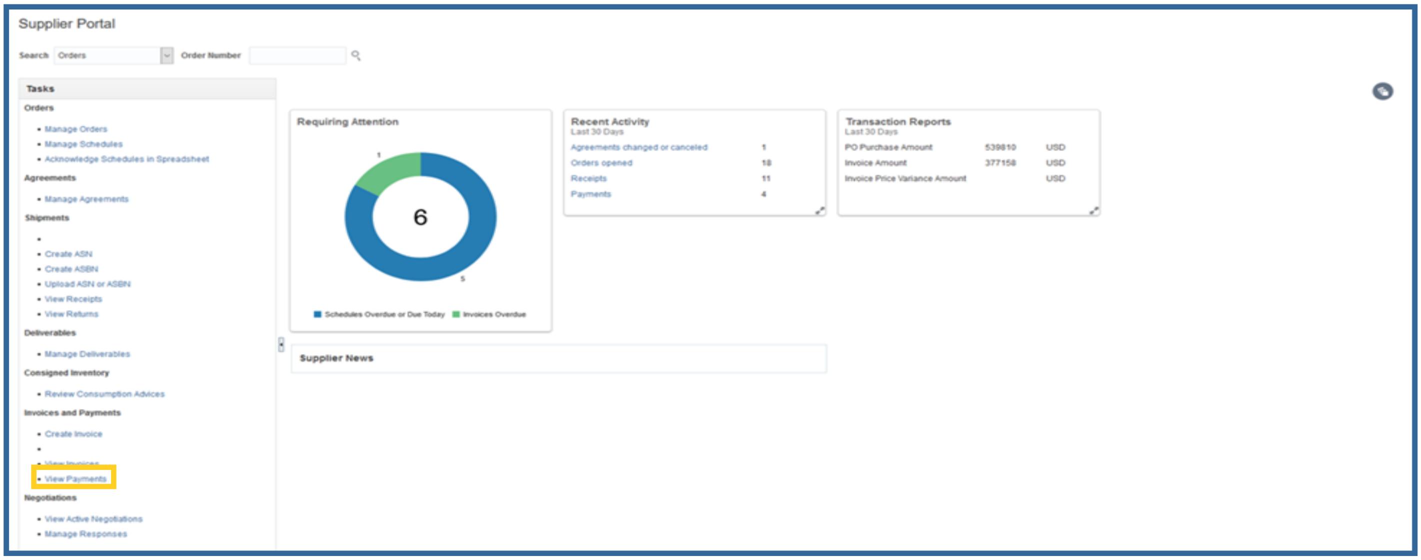
4) Click **Done** to return to the previous screen.

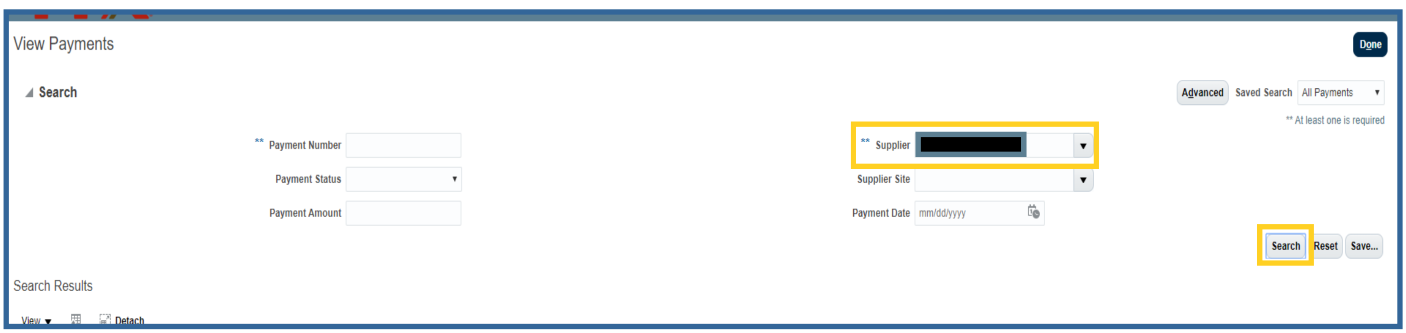


View Payments

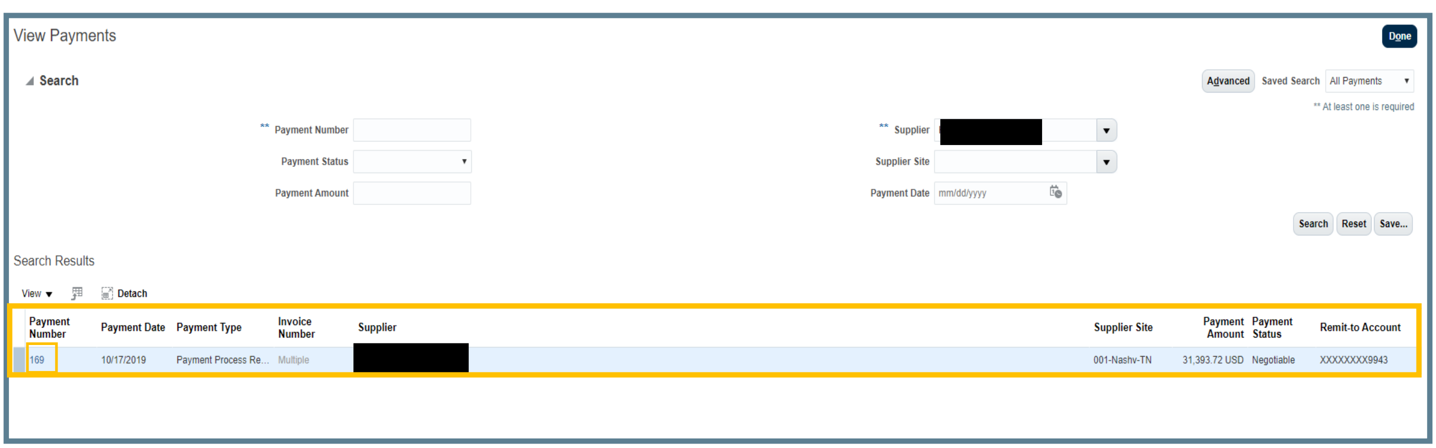
1) Under the **Invoices and Payments** subcategory of the Tasks pane, click **View Payments**.



2) In the **Supplier** text field, enter or select your company name from the drop-down menu. Then, click **Search**. (Feel free to utilize other text fields to filter results.)



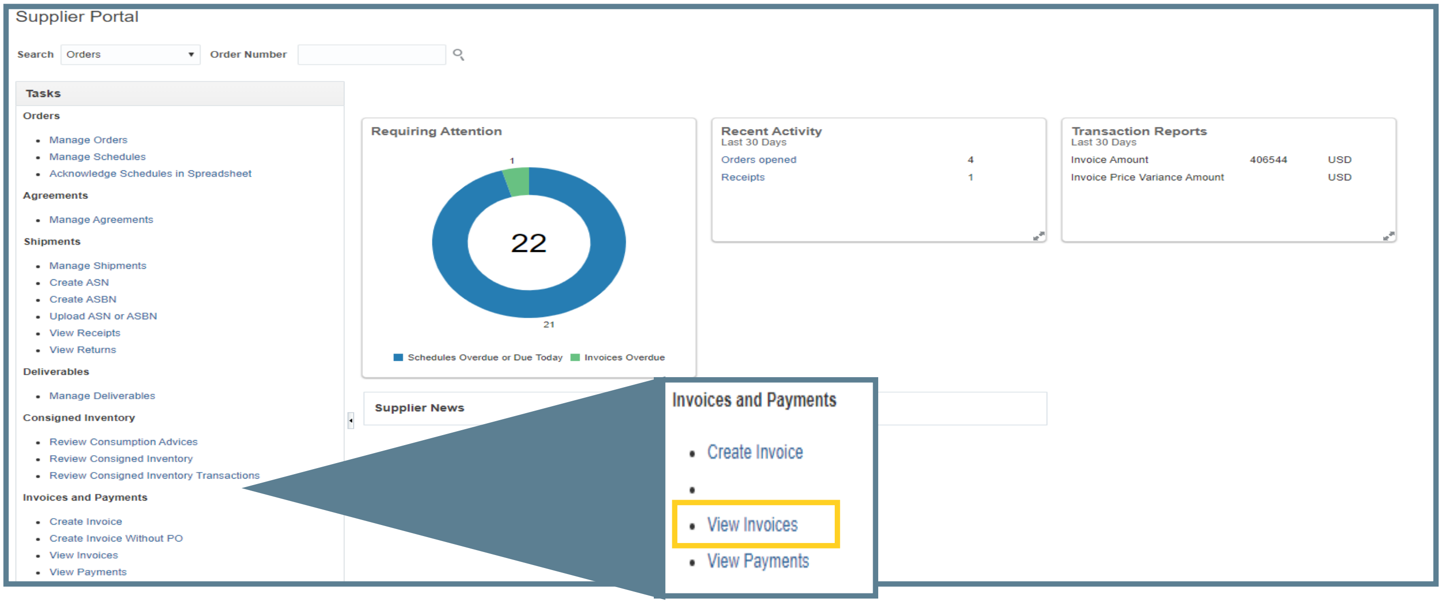
3) Click any payment number to view remittance details.



Actioning Incomplete Invoices

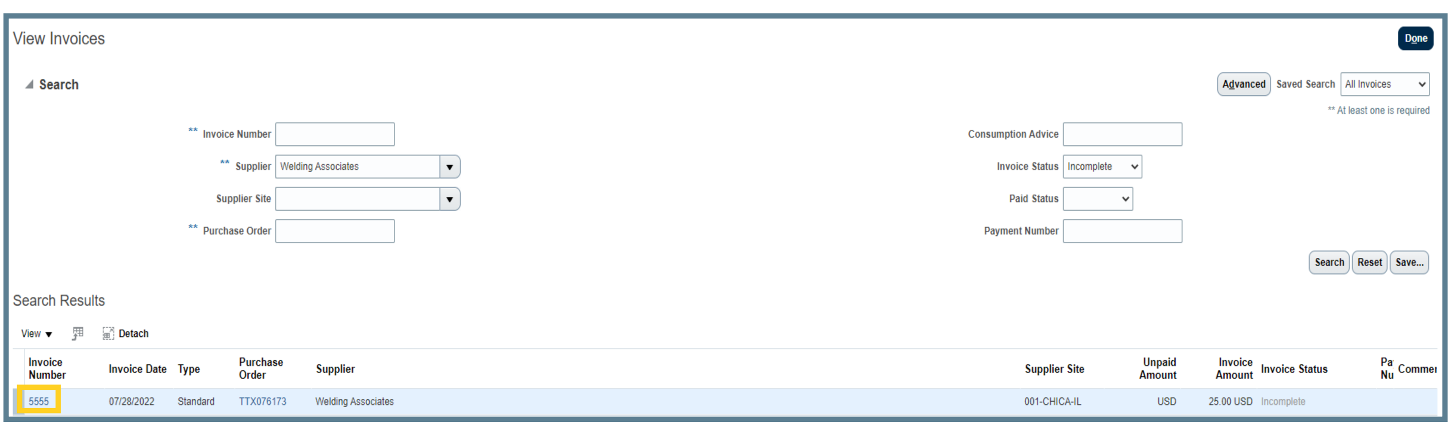
Note: **Incomplete invoices must be submitted or canceled.**

1) Under the **Invoices and Payments** subcategory within the Tasks pane, click **View Invoices**.

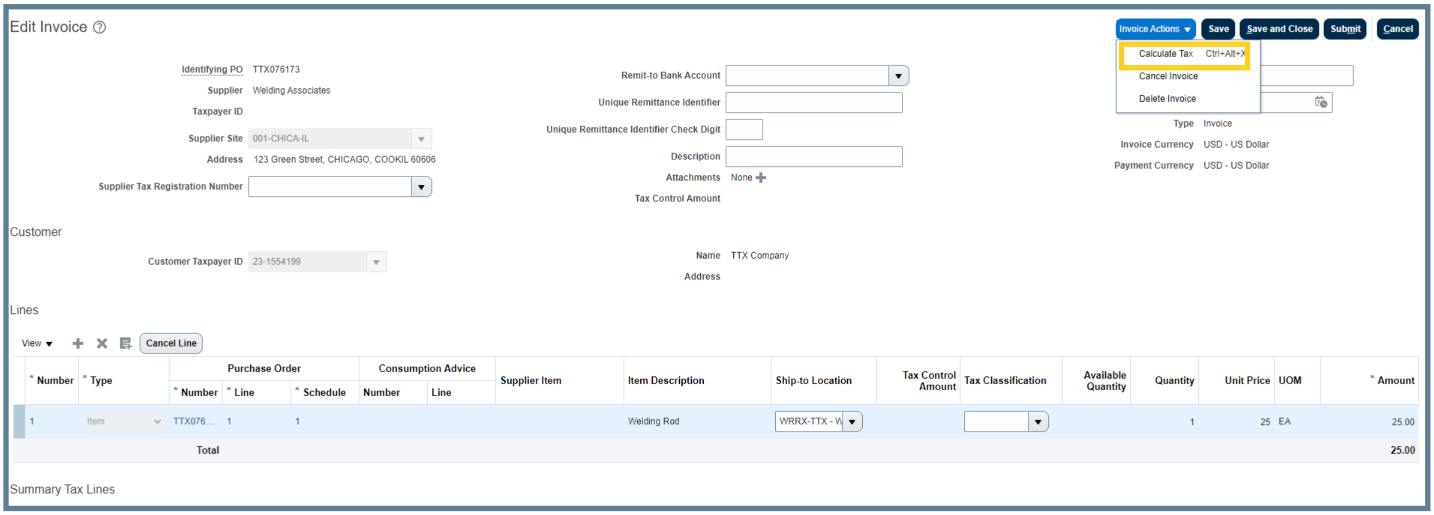


2) In the **Supplier** text field, enter or select your company name from the drop-down menu. Then, select “Incomplete” from the **Invoice Status** drop-down menu.

3) Click the Invoice Number to open the invoice.

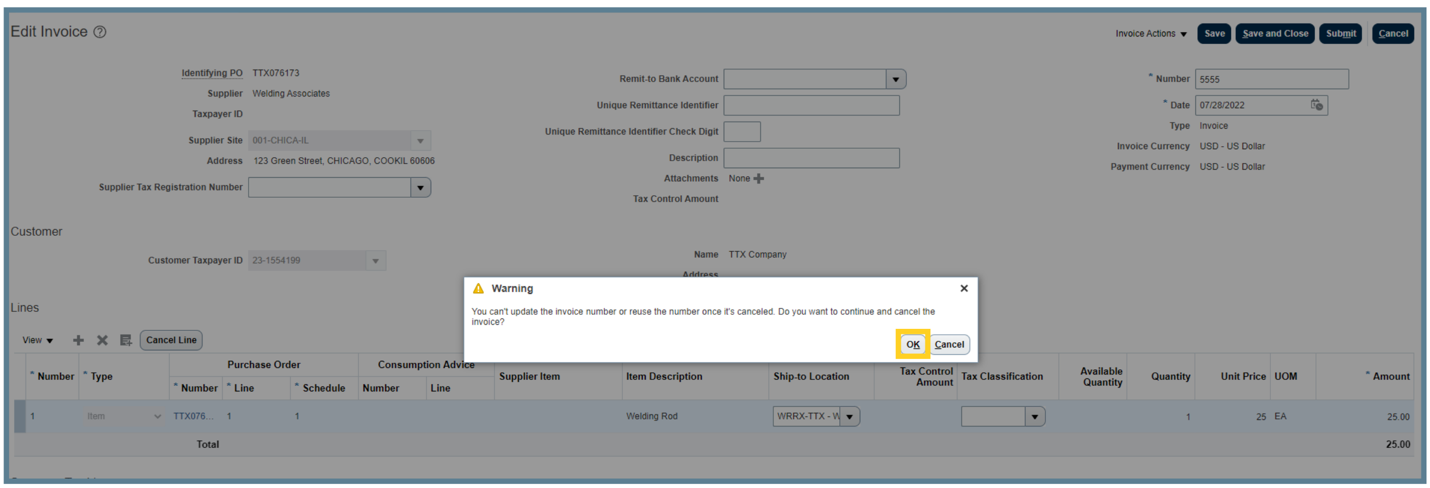


4) To cancel an invoice, click **Invoice Actions** and then select **Cancel Invoice** from the drop-down menu.

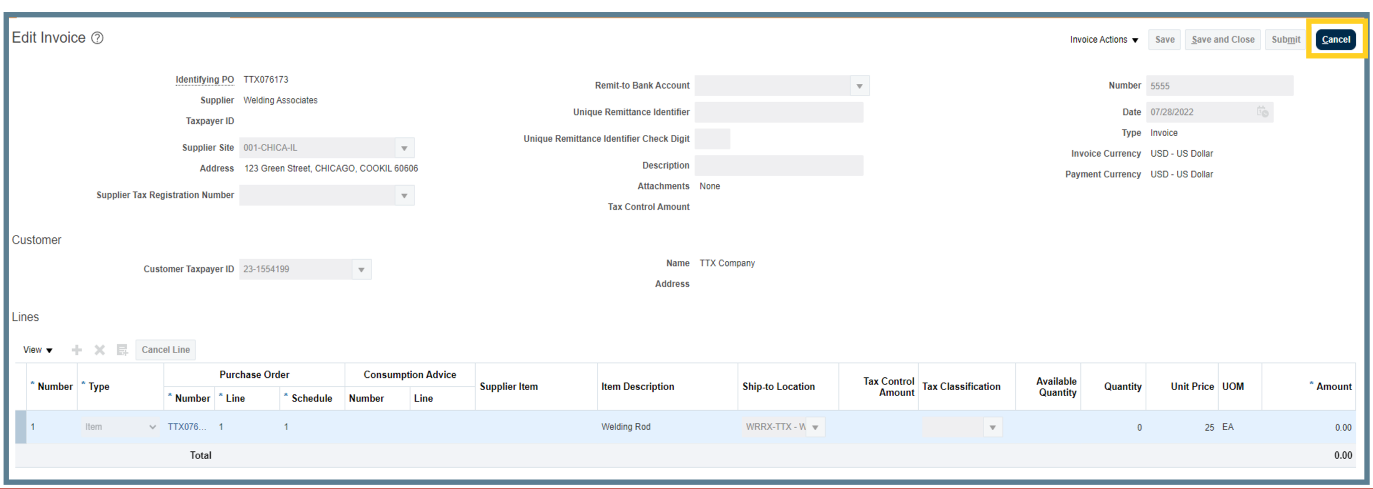


5) Click **OK** to confirm the cancellation or **Cancel** to withdraw it.

Please note: **Invoice numbers can never be reused even if canceled.** If you need to submit a new invoice in place of one that's been previously submitted, you must add at least one additional character to the new invoice number.



6) To return to the previous screen, click **Cancel**.



7) The invoice will show Canceled under the **Invoice Status** column. (The invoice statuses are hyperlinks that you can click to view details.)

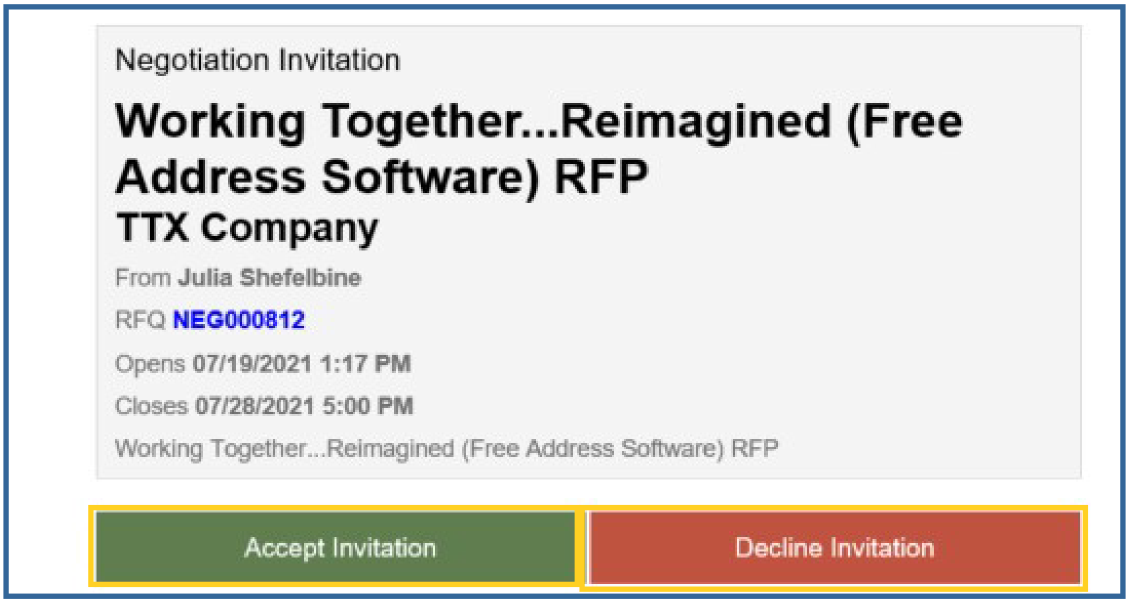
Search Results

View ▾ Detach

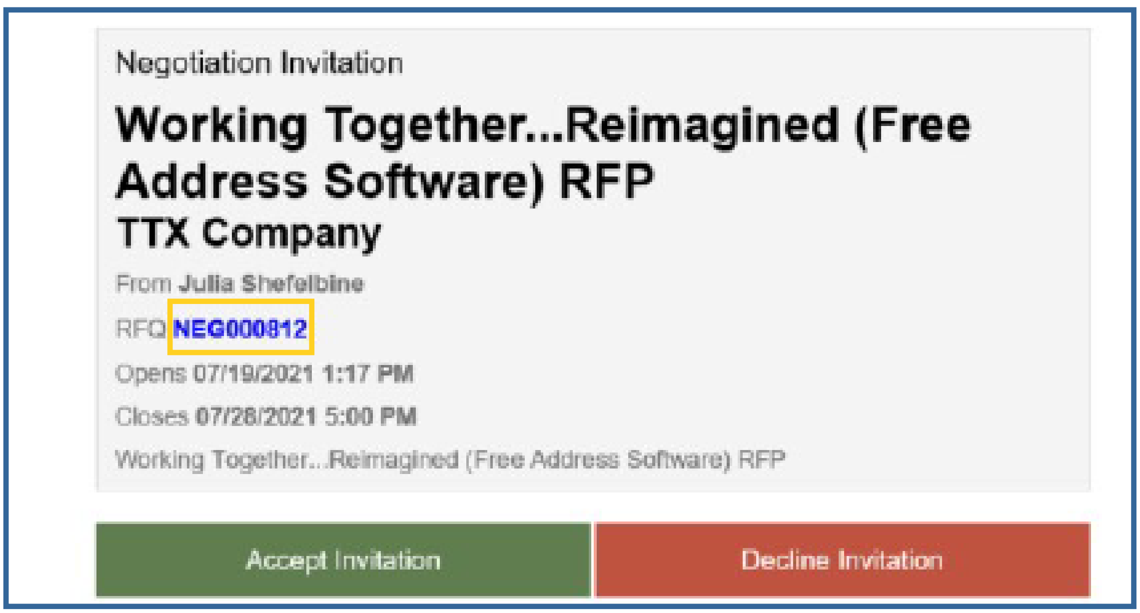
Invoice Number	Invoice Date	Type	Purchase Order	Supplier	Supplier Site	Unpaid Amount	Invoice Amount	Invoice Status
1111	07/28/2022	Standard	TTX076174	Welding Associates	001-CHICA-IL	27.56 USD	27.56 USD	On hold
3333	07/28/2022	Standard	TTX076175	Welding Associates	001-CHICA-IL	33.08 USD	33.08 USD	On hold
5555	07/28/2022	Standard	TTX076173	Welding Associates	001-CHICA-IL	0.00 USD	0.00 USD	Canceled

Accept/Reject RFP Negotiation Invitation

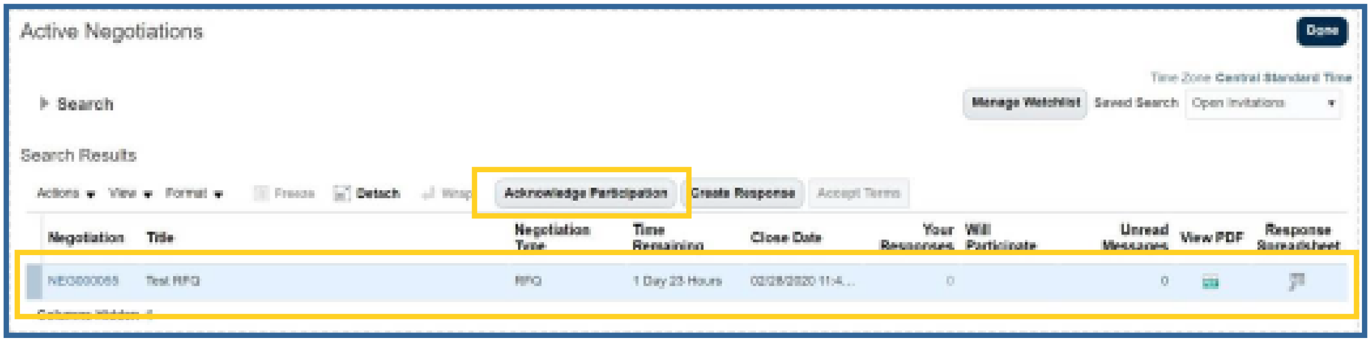
1) Once the RFP is published, you'll receive an email prompting you to accept or decline the invitation. Click the **Accept Invitation** or **Decline Invitation** button to make your selection.



2) Click the negotiation number to access the RFP/Negotiation.

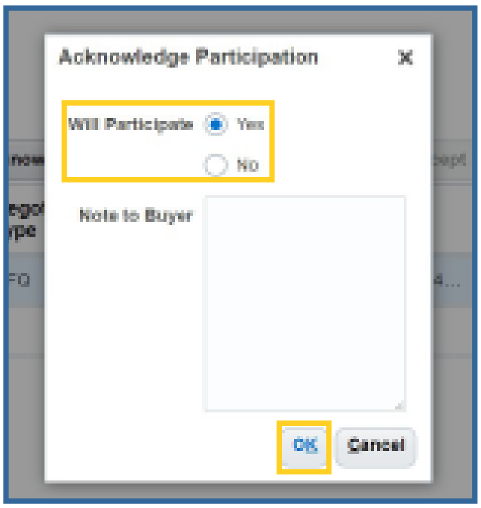


3) Select the row that previews the negotiation details(should turn blue), then click the **Acknowledge Partici-**

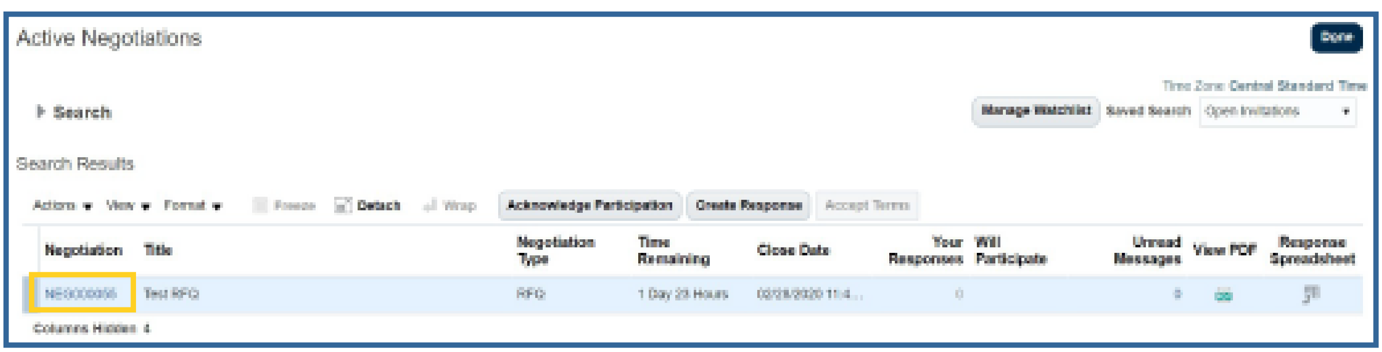


4) Beside **Will Participate,** select Yes or No. **Note to Buyer** is optional.

4a) Click **OK** when you're done.

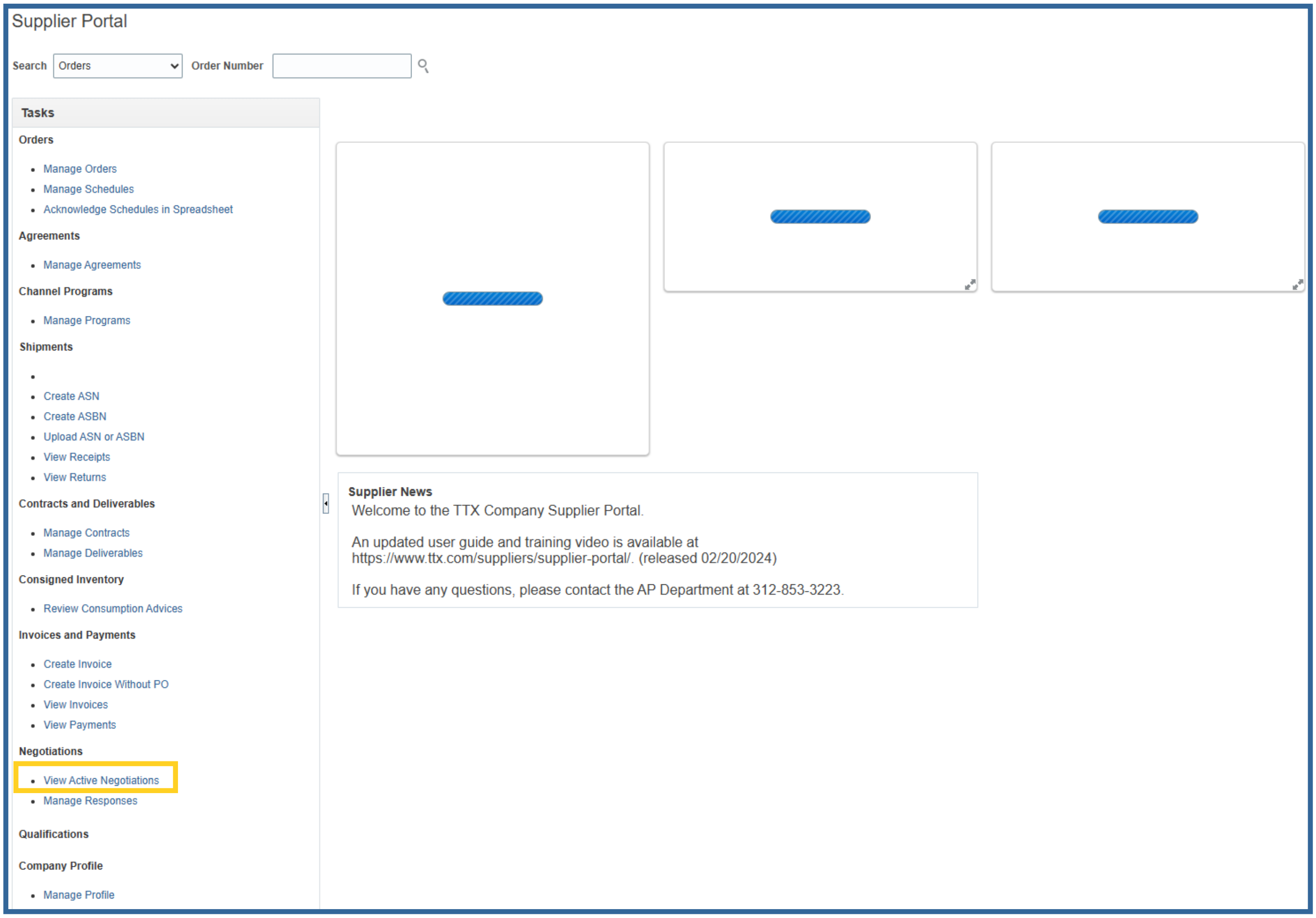


5) To view the RFP, click the negotiation number hyperlink.

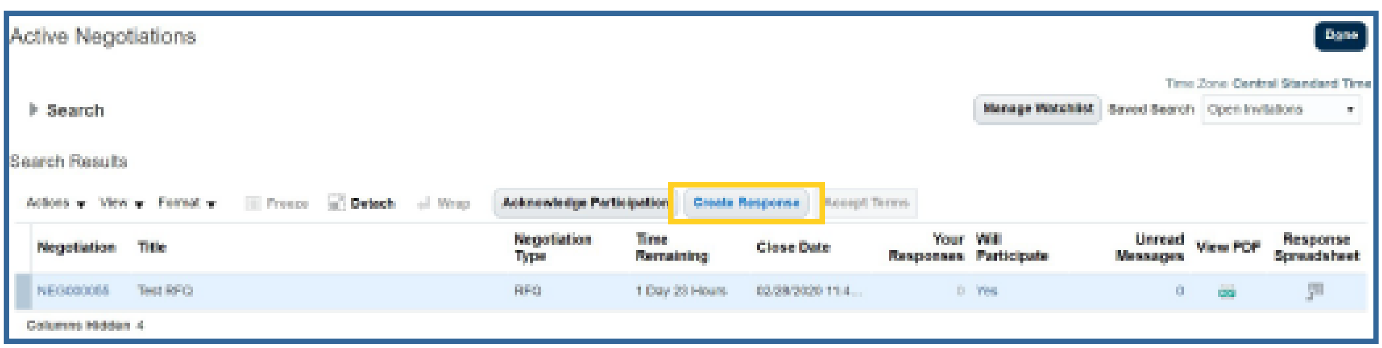


Submitting a Negotiation Response

1) Under the **Negotiations**, click **View Active Negotiations**.



2) Click the **Create Response** button.



3) Review and complete each section of the negotiation accordingly:

Note: Use **Next** and **Back** buttons to navigate between sections.

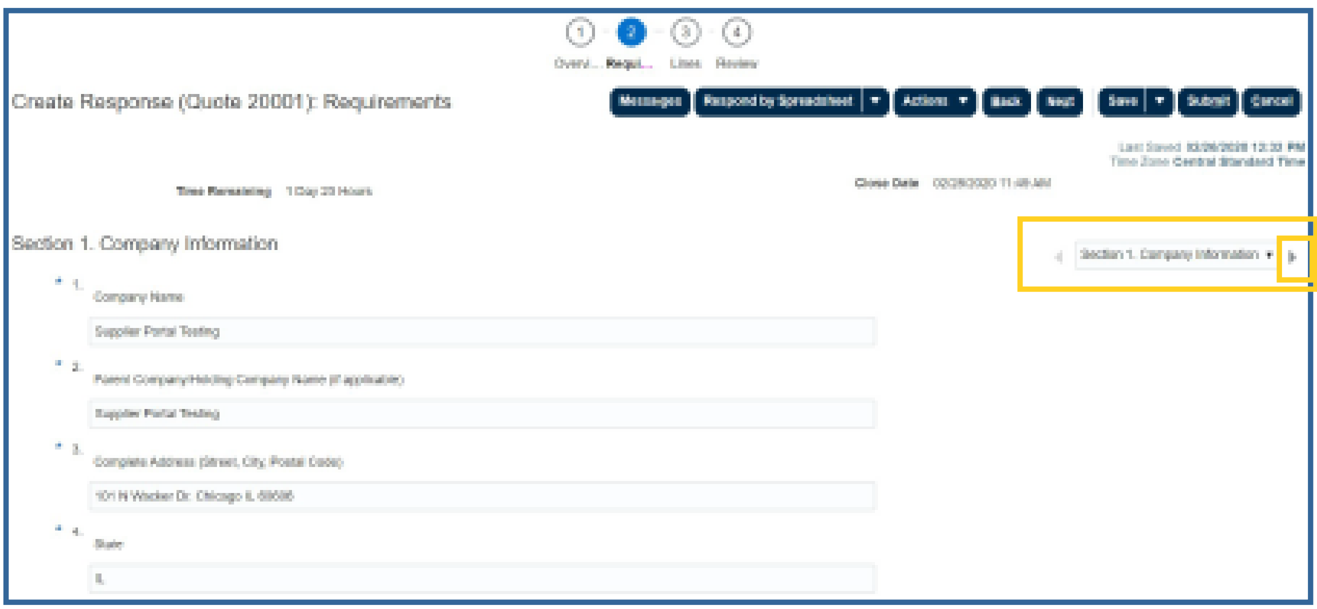
1. Overview:

1a. Complete **Request Valid Until** and **Attachments** fields at minimum. Other fields optional.

2. Requirements:

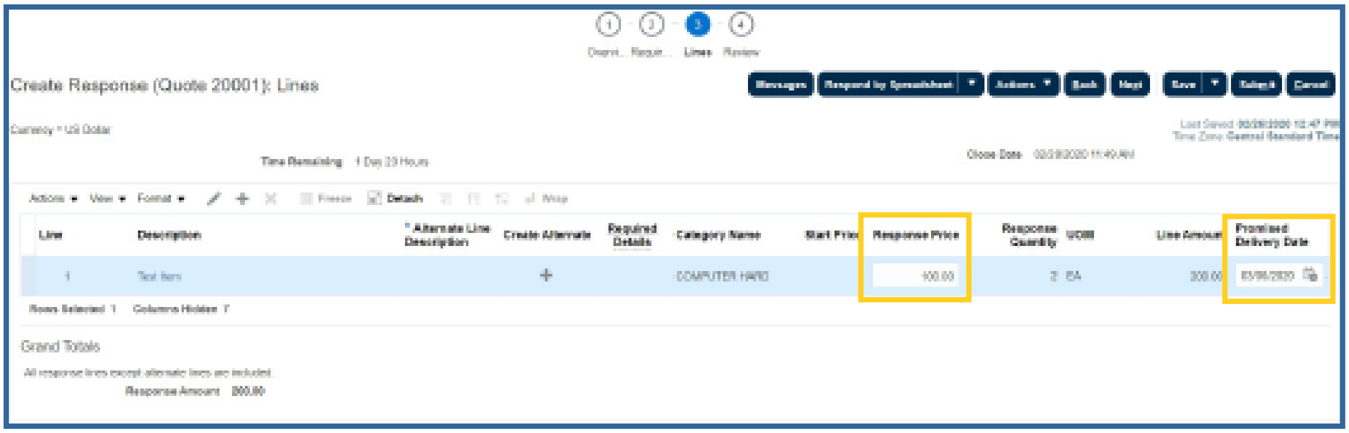
2a. Complete all fields marked with an asterisk(*)

2b. Be sure to use the arrow to navigate between the different sections for **Requirements**



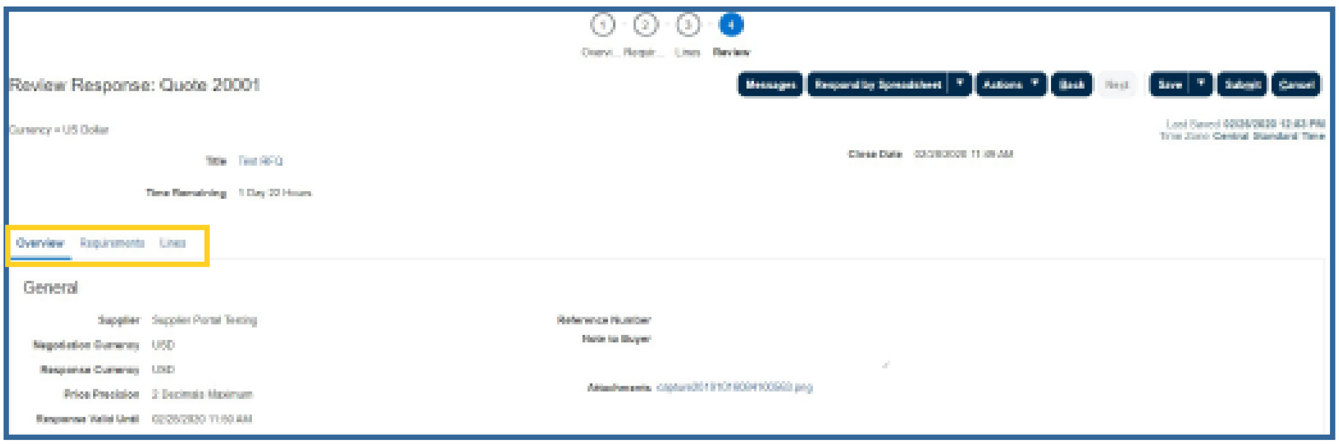
3. **Lines:**

3a. Complete **Response Price** field at minimum and **Promised Delivery Date** when/if applicable.

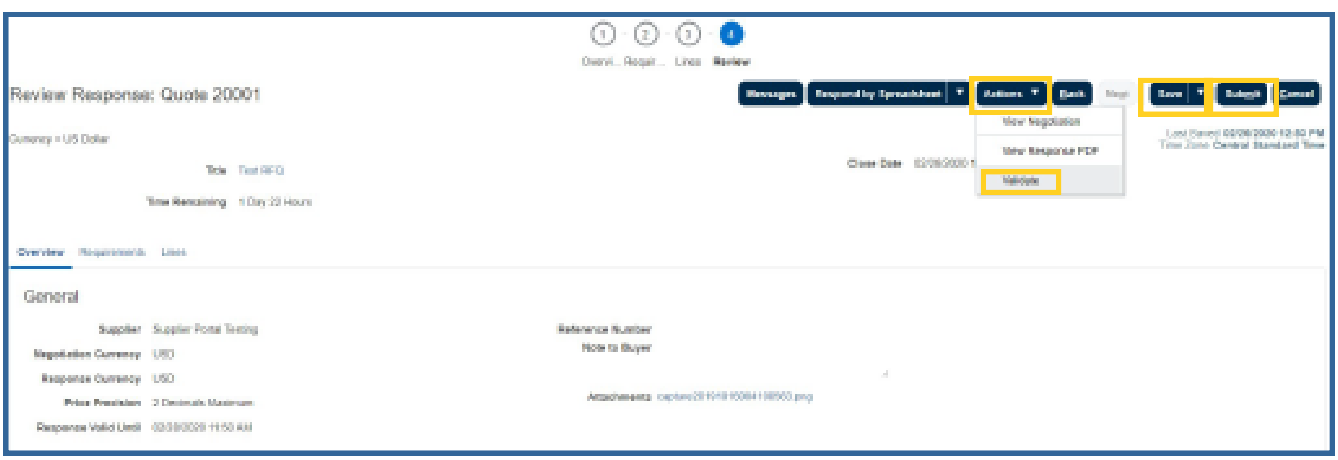


4. **Review Response:**

4a. Review each section of the response for accuracy and completeness.

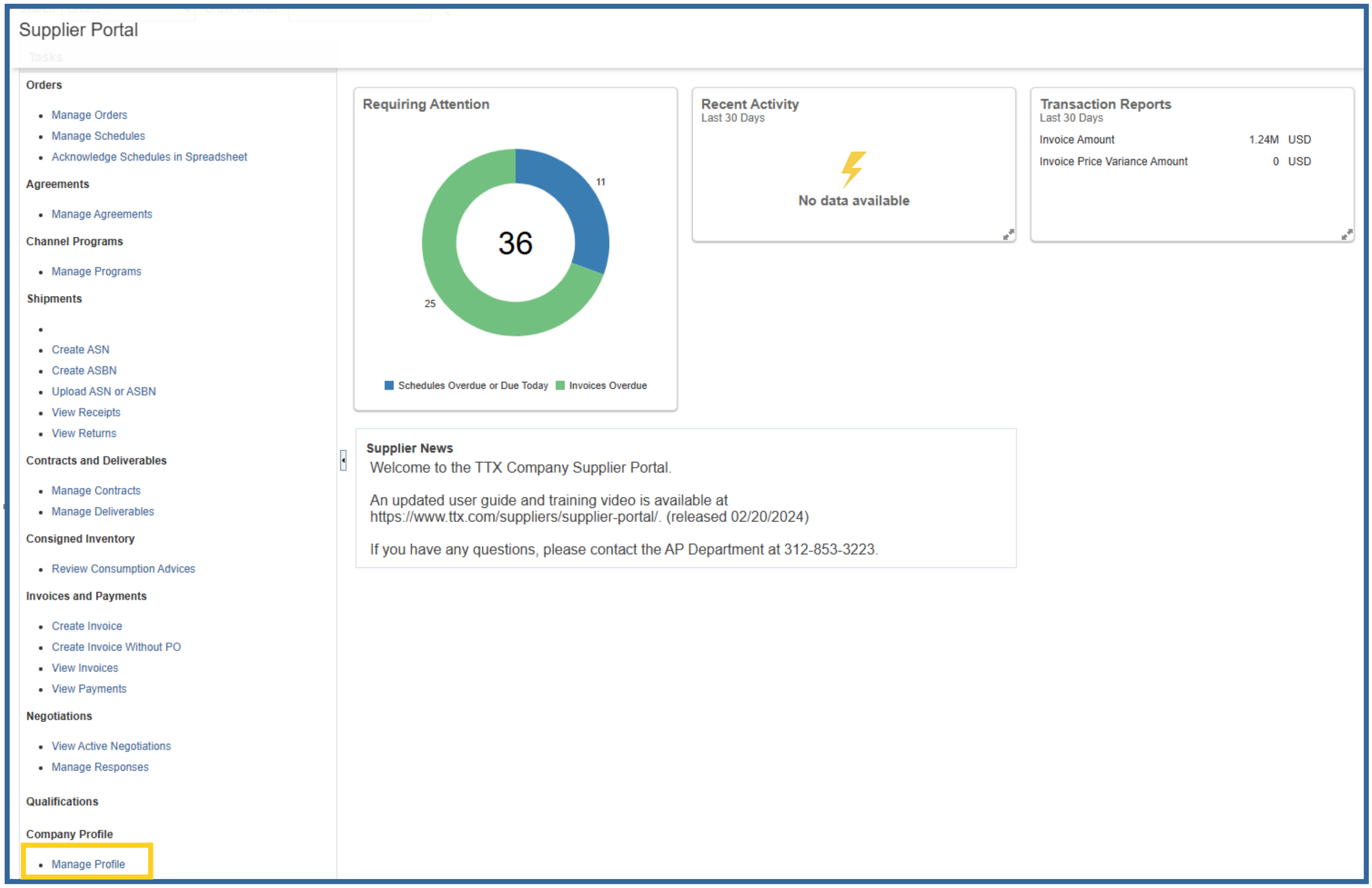


4) When you're finished reviewing, click **Save**. Then, click **Actions** and select **Validate** from the drop-down menu. Lastly, Click **Submit** .

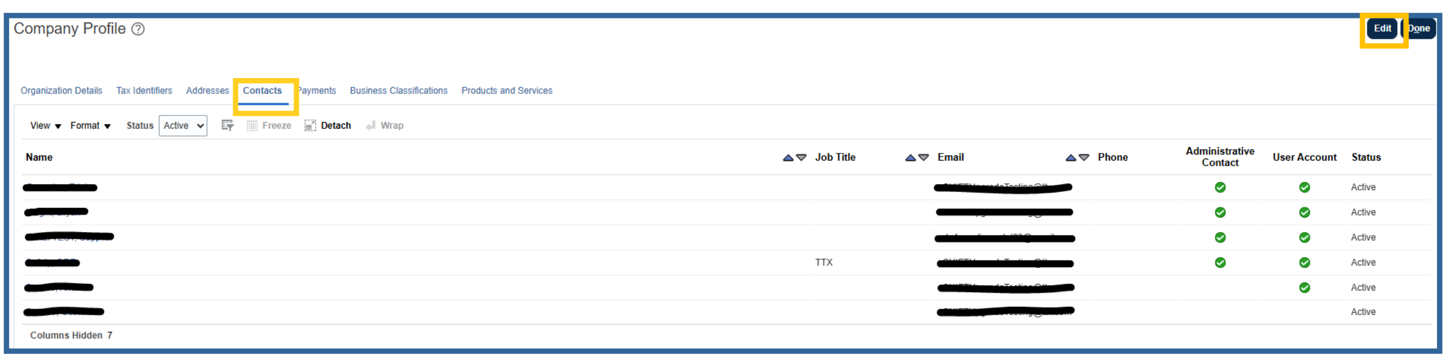


Manage Profile

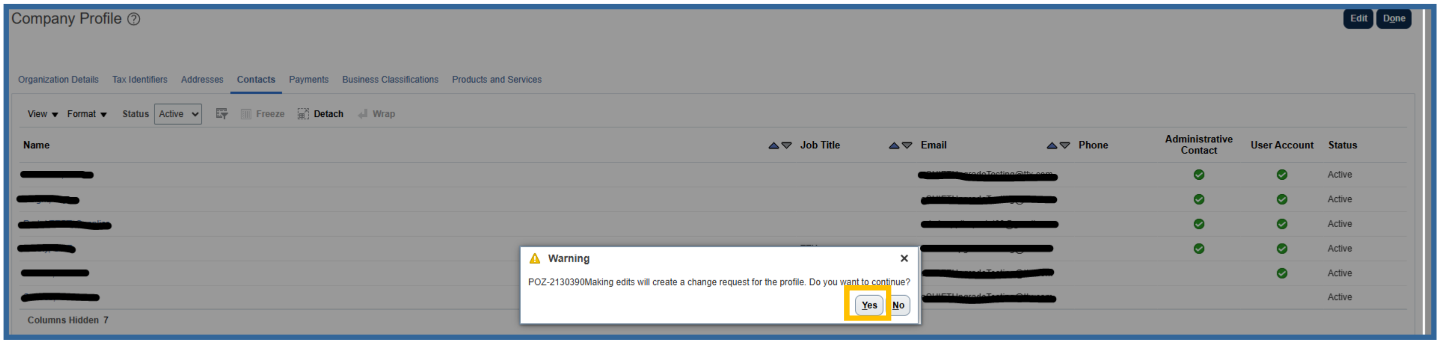
1) Under **Company Profile** at the bottom of the Tasks Pane, click Manage Profile.



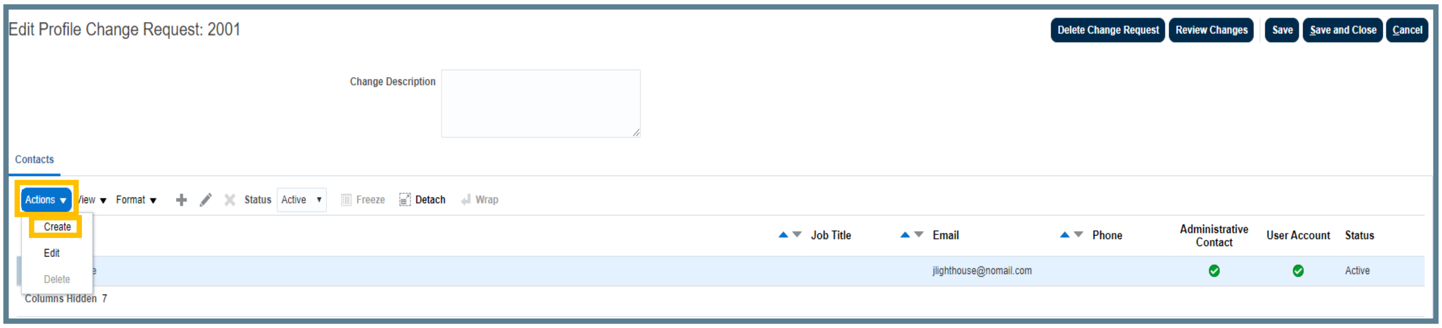
2) Click over to the Contacts tab. Then, click **Edit** in the top right corner of the screen.



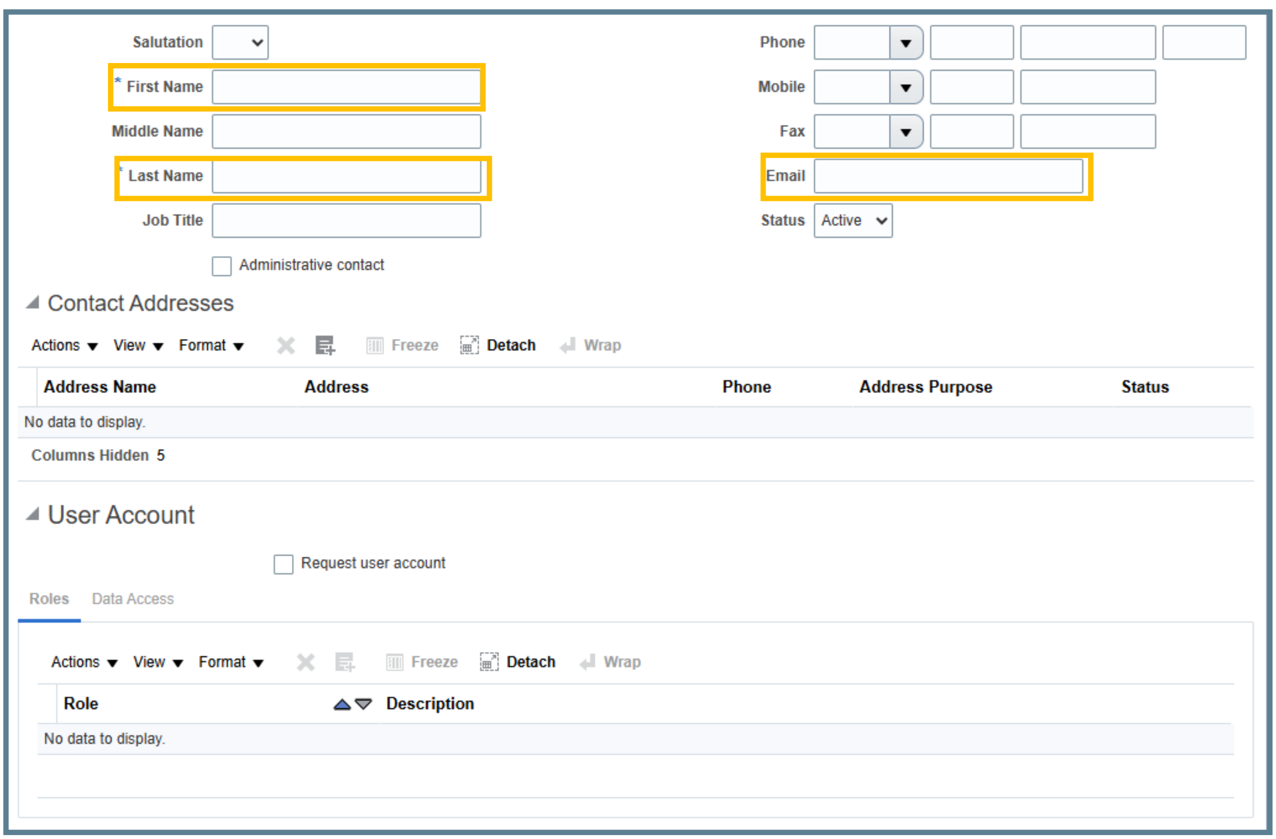
3) Click **Yes** to proceed in creating a Profile Change Request.



4) Click **Actions, and** then select **Create** from the drop-down menu. (**Change Description** is optional.)



5) Complete the ***First Name**, ***Last Name**, and **Email** text fields at minimum. All other fields are optional.

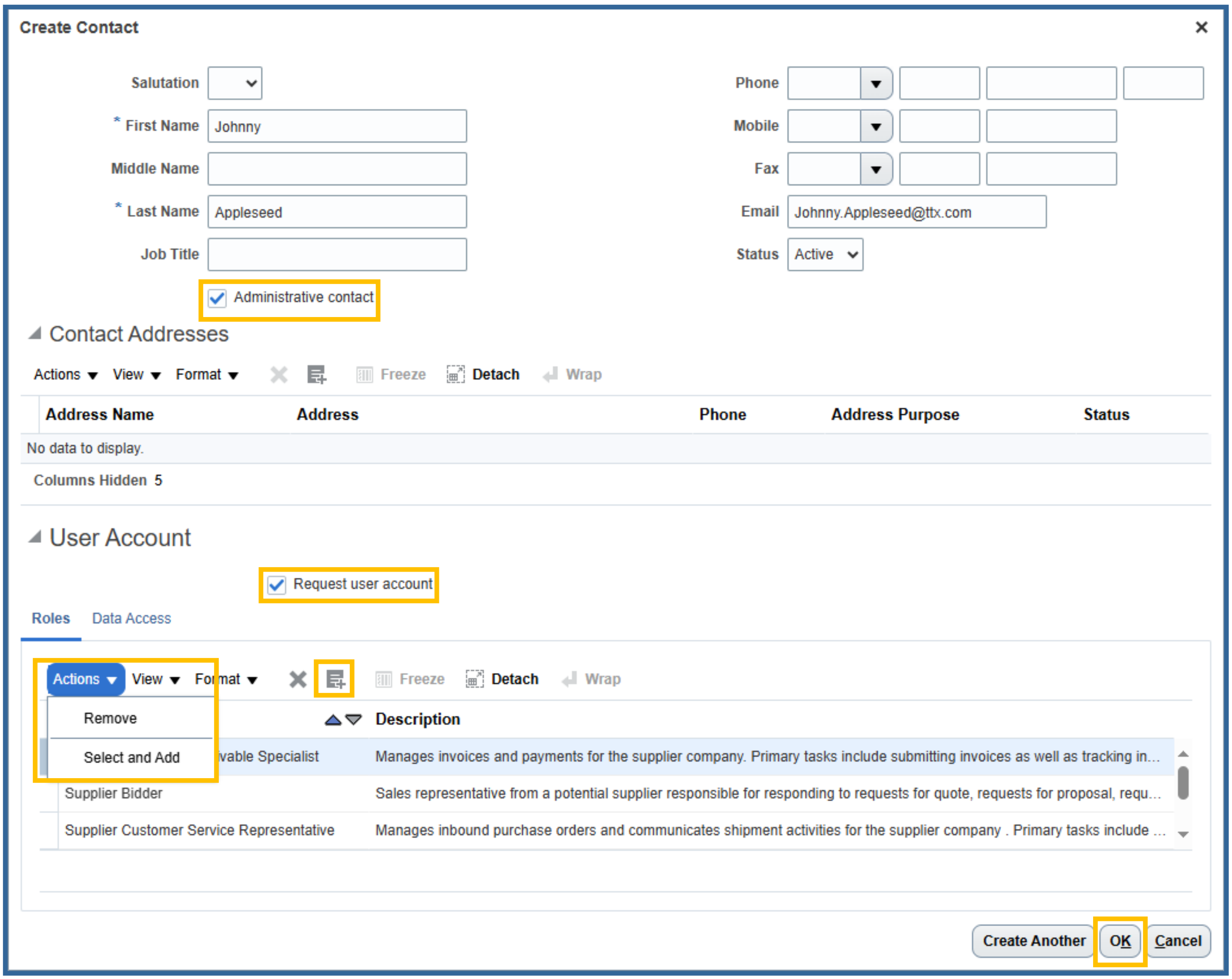


6) To give the contact administrative privileges over the profile allowing them to submit profile change requests, check the **Administrative contact** box.

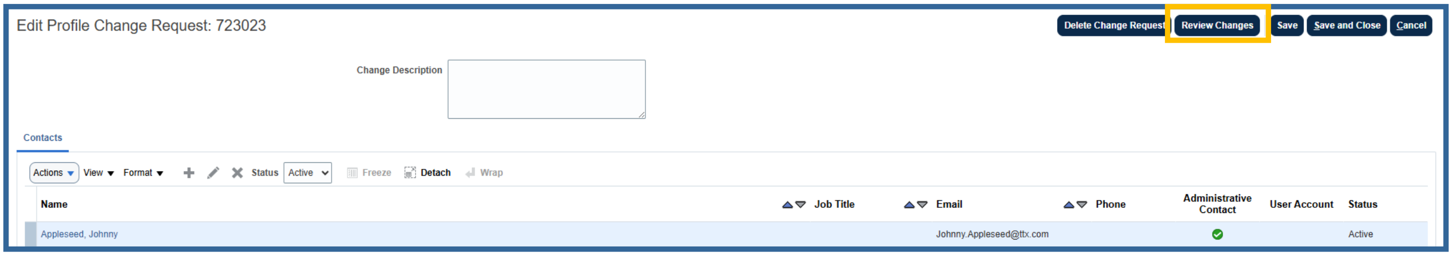
7) To create a user account for the contact, check the **Request user account** box.

Please note that under **User Account, you can customize their Roles and Data Access as well. Options to Select and Add and Remove can be found under the **Actions** drop-down menu. You can also utilize the Select and Add icon.** 

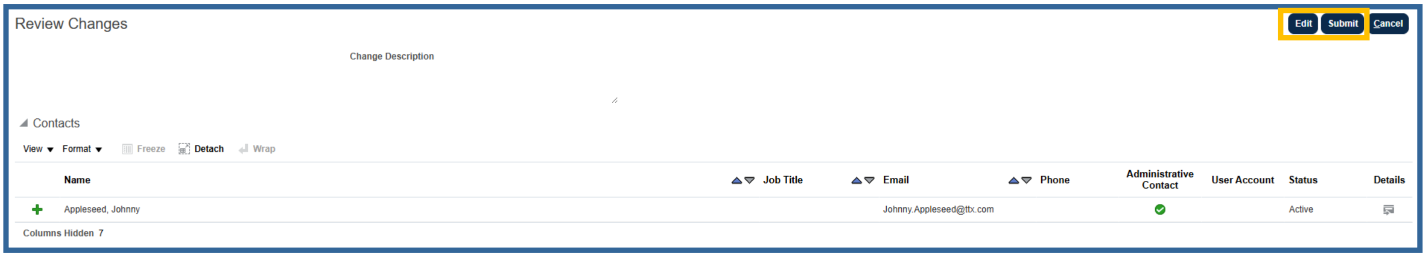
8) Once you're done, click **OK**.



9) Click **Review Changes**.

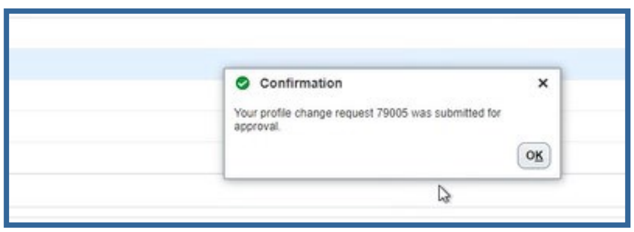


10) After reviewing your changes, click **Submit**. If you need to go back and change anything, click **Edit**.



11) You'll receive a pop up confirming submission if done correctly.

11a. Click **<u>O</u>K**, then **Done** to return to the previous screen.



Our Vendor Request team(VendorRequests@ttx.com) will process the request. Please allow them 24-48 hours.