


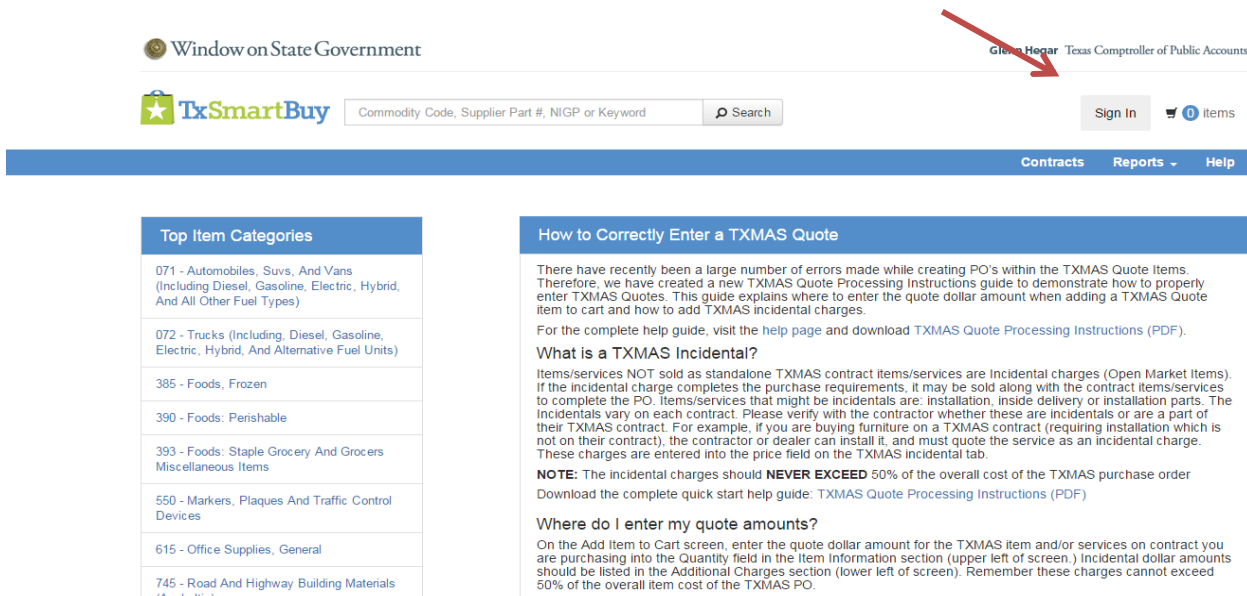
Contractor Portal Instructions

****If you are using Internet Explorer as your browser please follow these steps before trying to log in for the first time****


- **Open an Internet Explorer**
 - **Go to  in the upper right hand corner**
 - **Select internet options-browser history and select delete to clear your browser history**
 - **Close your browser and open a new session then you can log into TxSmartBuy for the first time.**
- **Dealers will not be set up with access for the Contractor Portal**
 - **Only one Login and Password will be set up for each Contractor**

Getting Started with the Contractor Portal

- Go to <http://www.txsmartbuy.com/>
- Select Sign in <http://www.comptroller.texas.gov/procurement/tools/comm-book/>



Window on State Government Glenn Hegar, Texas Comptroller of Public Accounts

TxSmartBuy Commodity Code, Supplier Part #, NIGP or Keyword Search Sign In  0 items

Contracts Reports Help

Top Item Categories

- 071 - Automobiles, Suvs, And Vans (Including Diesel, Gasoline, Electric, Hybrid, And All Other Fuel Types)
- 072 - Trucks (Including Diesel, Gasoline, Electric, Hybrid, And Alternative Fuel Units)
- 385 - Foods, Frozen
- 390 - Foods: Perishable
- 393 - Foods: Staple Grocery And Grocers Miscellaneous Items
- 550 - Markers, Plaques And Traffic Control Devices
- 615 - Office Supplies, General
- 745 - Road And Highway Building Materials (Asphaltic)

How to Correctly Enter a TXMAS Quote

There have recently been a large number of errors made while creating PO's within the TXMAS Quote Items. Therefore, we have created a new TXMAS Quote Processing Instructions guide to demonstrate how to properly enter TXMAS Quotes. This guide explains where to enter the quote dollar amount when adding a TXMAS Quote item to cart and how to add TXMAS incidental charges.

For the complete help guide, visit the [help page](#) and download [TXMAS Quote Processing Instructions \(PDF\)](#).

What is a TXMAS Incidental?

Items/services NOT sold as standalone TXMAS contract items/services are Incidental charges (Open Market Items). If the incidental charge completes the purchase requirements, it may be sold along with the contract items/services to complete the PO. Items/services that might be incidentals are: installation, inside delivery or installation parts. The incidentals vary on each contract. Please verify with the contractor whether these are incidentals or are a part of their TXMAS contract. For example, if you are buying furniture on a TXMAS contract (requiring installation which is not on their contract), the contractor or dealer can install it, and must quote the service as an incidental charge. These charges are entered into the price field on the TXMAS incidental tab.

NOTE: The incidental charges should **NEVER EXCEED** 50% of the overall cost of the TXMAS purchase order. Download the complete quick start help guide: [TXMAS Quote Processing Instructions \(PDF\)](#)

Where do I enter my quote amounts?

On the Add Item to Cart screen, enter the quote dollar amount for the TXMAS item and/or services on contract you are purchasing into the Quantity field in the Item Information section (upper left of screen.) Incidental dollar amounts should be listed in the Additional Charges section (lower left of screen). Remember these charges cannot exceed 50% of the overall item cost of the TXMAS PO.

- Enter the email address and password provided in this welcome email

If you have any issues using Smartbuy please contact the Help Desk at txsmartbuy@cpa.state.tx.us or call toll free 888-479-7602 or 512-936-2764

- You will be prompted to change your password and set up your security questions, when complete, select set up account

First Time Account Setup

Welcome to TxSmartBuy! To begin using TxSmartBuy, please set up your account following the steps below.

STEP 1. CHOOSE A NEW PASSWORD

Password Criteria

1. At least 8 characters long
2. Contains at least 3 of these 4 character types:
 - Uppercase alpha characters (A, B, ... Z)
 - Lowercase alpha characters (a, b, ... z)
 - Numbers (0, 1, 2, 3, 4, 5, 6, 7, 8, 9)
 - Any of these specific, non-alphanumeric ASCII characters (@#%*^&!*~""'"/+?-,(){}<>)
3. Does not contain your username
4. Does not match previously used passwords (including temporary)

Current Password

Choose a New Password

Confirm New Password

STEP 2. SELECT SECURITY QUESTIONS

Choose 3 security questions and provide answers for each question. Questions and answers must be unique. These security questions will be asked of you in the future if you need to reset your password.

Question 1

What city would you choose never to visit again? ▼

Answer 1

Question 2

In what city did you meet your spouse/significant other? ▼

Answer 2

Question 3

What is your favorite movie? ▼

Answer 3

STEP 3. ACCESS THE NEW, MODERN TXSMARTBUY

The statewide procurement teams at the Comptroller's office worked diligently to improve the Texas purchasing experience and provide you with advanced search and online ordering technology used by Internet industry leaders. We hope the new TxSmartBuy will help make your purchases easy to complete and increase transparency of Texas government spending.

We will continue to enhance this system and add new features and functionality based upon your feedback. Select the Setup Account button to complete your account setup and start using TxSmartBuy.



Setup Account

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- After confirmation of set up, select Go to My Account



First Time Account Setup

Account setup complete! Click the button below to go to My Account. ×

[Go to My Account](#)

My Account Features

- In My Account you can choose to:
 - See the Overview of your account
 - Change your password or security questions
 - View current and past Purchaser orders
 - View current and Past Fee Invoices (back to June 1, 2014)
 - Admin Fee and TXMAS Sales Rebate payments (back to June1, 2014)

My Account

Overview
Addresses
Update Your Password
Update Your Security Questions
Purchase Orders
Invoices
Payment History

TxSmartBuy User Survey

Greetings,

We're looking for your input on what features you think would most benefit SmartBuy users. Please take a few minutes to complete the online survey.

[Click here to take TxSmartBuy User Survey](#)

Thank you for your time.

ATTENTION STATEWIDE PURCHASERS:

Certain vendors' items have been temporarily removed from the TxSmartBuy search.

[View Vendor List \(.xls\)](#)

[PRIMARY INFORMATION](#)

Searching and Viewing the Contractor Portal Information

- Each Category of information (Purchase Orders, Invoices, and Payment History) has its own set of filters available. This will allow you to narrow your search by one of the

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following fields (If you don't select a filter criteria it will automatically show the most current at the top of the results list. You can use one or more filters at one time to narrow your search results.

Purchase Orders

Purchase Order Number	Contract Number	Customer Tracking Number	Agency/CO-OP
<input type="text"/>	-- <input type="text"/>	<input type="text"/>	<input type="text"/>
Date Range	Start Date	End Date	Dealer(s)
-- <input type="text"/>	<input type="text"/>	<input type="text"/>	None selected <input type="text"/>
<input type="button" value="Search"/>	<input type="button" value="Clear Filters"/>		<input type="button" value="Export Results"/>

Purchase Order List

Showing 1 - 23 of 23

If you drill down you can see all details of a PO, Payment, or Invoice record.

- Purchase Orders Fields
 - Purchase Order Number—Smartbuy PO Number
 - Contract Number—If you have Multiple contracts you may want to view one contract at a time by using the contract filter
 - Customer Tracking Number—is what the purchaser entered for the tracking number at the time they checked out.
 - Agency/CO-OP—you can enter part of either the Agency or CO-OP name or number
 - Date Range- Allows for a preset time range i.e. One week ago
 - Start Date—Set up a custom time range can be used by itself or with the End date filter
 - End Date
 - Dealer(s)—if you have dealers you can select one of the dealers to view any Purchase Orders they have received on your contract.
- Viewing Purchase orders
 - After logging into to your account select Purchase Orders from the grey menu on the left hand side of the page.

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- Use the filter at the top of the purchase order page to search for the desired PO.
- Select the blue View Details box to see the complete PO
- To use any of the Filters enter your search criteria in the appropriate filter and select search
- You can clear your selection by using the clear filters and change your search criteria, then search again

Search PO filters

Purchase Orders

Purchase Order Number

Contract Number

Customer Tracking Number

Agency/CO-OP

Date Range

Start Date

End Date

Dealer(s)

Purchase Order List
Showing 1 - 50 of 480

<p>Purchase Order Date 12/11/2015</p> <p>Purchase Order Number 16033191</p> <p>Contractor/Dealer ABC Company</p>	<p>Purchase Order Total \$1.44</p> <p>Status PO Issued</p> <p>Company/Agency TxCPA Agency for Testing - 54321</p>	<input type="button" value="Q View Details"/> <p>Tracking #: 555</p> <p>Revision #: - None -</p>
<p>Purchase Order Date 12/11/2015</p> <p>Purchase Order Number 16033186</p> <p>Contractor/Dealer ABC Company</p>	<p>Purchase Order Total \$68.38</p> <p>Status PO Issued</p> <p>Company/Agency TxCPA Agency for Testing - 54321</p>	<input type="button" value="Q View Details"/> <p>Tracking #: scroll test 2</p> <p>Revision #: - None -</p>

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Purchase Order Details

[Back to results](#)

PO Number: [16033191 \(View PDF\)](#)

Agency/CO-OP: TxCPA Agency for Testing - 54321

Tracking Number: 555

PO Note: YEEHAW

[Update PO Header](#)

[View PO attachments](#)

File: Practice Quote 2.pdf

Order Date	Order Total	Order Status
12/11/2015	\$1.44	PO Issued

Line #	Item	Commodity	Address	Qty	UOM	Price	Total
1	#2 Yellow Aspect[REG] Wood Pencils	62080	12312 505 S Congress Avenue Austin TX 78745	12	EACH	\$0.12	\$1.44

○ Invoices Fields

- Invoice Number
- Purchase Order Number—SmartBuy PO number
- Invoice Status—Open or Paid
- View invoice details select an invoice you can view all PO's associated with that Invoice. The blue PO number is a clickable link to view that Po's details
- Fee Type—TSB Admin Fee or TXMAS Sales Rebate
- Date Range- Allows for a preset time range i.e. One week ago
- Start Date—Set up a custom time range can be used by itself or with the End date filter
- End Date

○ Viewing Admin Fee and TXMAS Rebate Invoices

- From the Main Overview Account page choose Invoices from the grey menu on the left hand side of the page
- Use the filter at the top of the purchase order page to search for the desired invoice.

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- Select View Details to view the PO's included on an invoice.

Invoice Details

Back to results View this invoice as a PDF View Invoice PDF Invoice CSV

Invoice Number: 109073

Invoice Date	Invoice Total	Fee Type	Invoice Status
12/2/2015	\$467.73	Admin	Open

Extract the Invoice results into Excel

Line Item #	Item Name	Purchase Order	Internal Tracking #	Delivery Date	Line Total	Fee Amount
1	0212070-- TXMAS-11- 51V0201822ALL	16012317	N/A	11/2/2015	\$48.50	\$0.73
2	1056235-- TXMAS-11- 51V0201822ALL	16012317	N/A	11/2/2015	\$75.95	\$1.14
3	1056238-- TXMAS-11- 51V0201822ALL	16012317	N/A	11/2/2015	\$75.95	\$1.14
4	0617068-- TXMAS-11- 51V0201822ALL	16012317	N/A	11/2/2015	\$4.93	\$0.07
5	0605394-- TXMAS-11- 51V0201822ALL	16012317	N/A	11/2/2015	\$66.18	\$0.99

View the PO Details

- Payment History

- Admin. Fee and TXMAS Rebate Invoice Number
- Check Number
- ACH Number
- Date Range- Allows for a preset time range i.e. One week ago
- Start Date—Set up a custom time range can b used by itself or with the End date filter
- End Date

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