

TUmarketplace User Guide

Prepared by Temple University Purchasing Services

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Managing Your TUmarketplace Homepage

Purpose: The homepage of TUmarketplace displays many of the vendors and forms available to the Temple community. Users have the ability to expand and collapse each window to make the page more manageable. This document explains how to do so and discusses important links that are present on the homepage.

1. Managing the homepage windows:

1.1. Log into TUmarketplace. The homepage will be displayed.

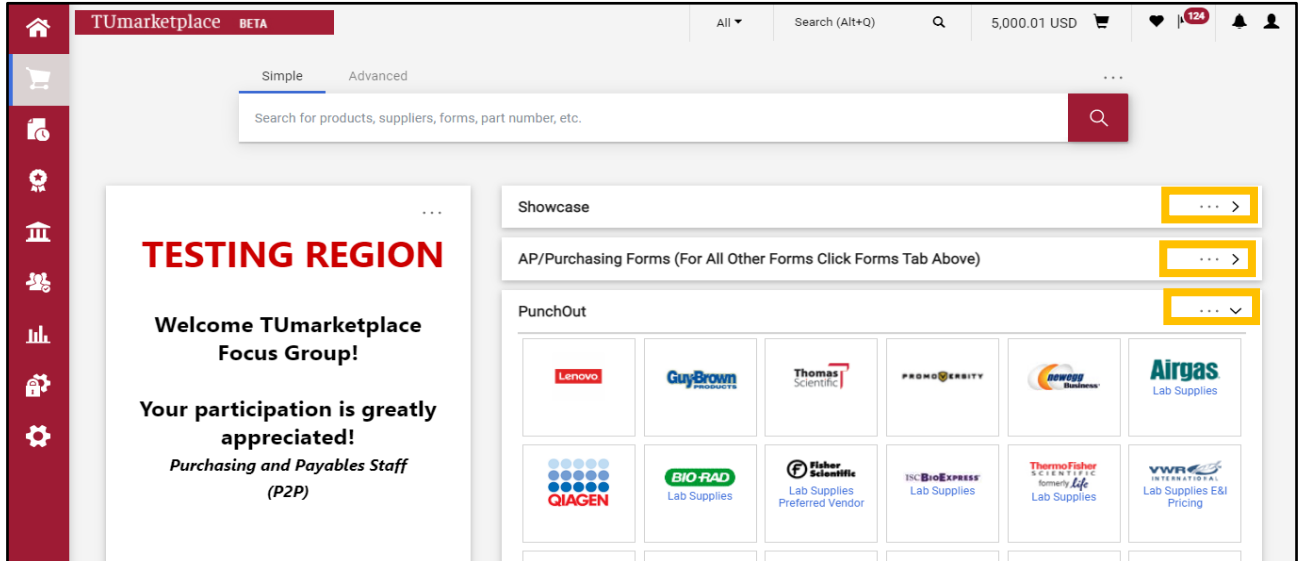
1.2. Notice that the Showcased Suppliers window, the AP/Purchasing Forms window, and the Punch-Out window are all expanded.

The screenshot shows the TUmarketplace homepage with a navigation bar at the top containing the TUmarketplace logo, a search bar, and user account information. A vertical sidebar on the left contains various icons for navigation. The main content area is divided into several sections:

- TESTING REGION:** A large white box on the left with a red header. It contains a welcome message for a focus group and lists new punchout vendors: American Medical Depot (AMD) and Colonial Electric.
- Showcase:** A grid of 18 vendor logos including Agilent, BD, Beckman Coulter, Chemglass, DENVILLE, Dot Scientific Incorporated, EMSCO, LDP, ParkinLerner, RAININ, MILIPORE SIGMA, spectrum, USA Scientific, COMPUTER BUSINESS SERVICES, and Billows.
- AP/Purchasing Forms:** A grid of 18 form links such as Temple University OWLtech Electr..., Fleet Card Application, Purchasing Card Application, Accounts Payable Invoice Payment..., Radioactive Materials Request, Laboratory Coat Order Form, PO Change Request Form, Digital Document Services, Request to create a blanket order, HR Payroll Form, HR Payroll - 1199, HR Payroll - Union Dues, Controller's Office, Contract Approval Request (FIS), VIS Security Camera Request Form, and Investment Operations.
- PunchOut:** A grid of 6 vendor logos including Lenovo, GuyBrowm, Thomas Scientific, PRIMO@EMBITY, BOWSER Business, and Airgas.

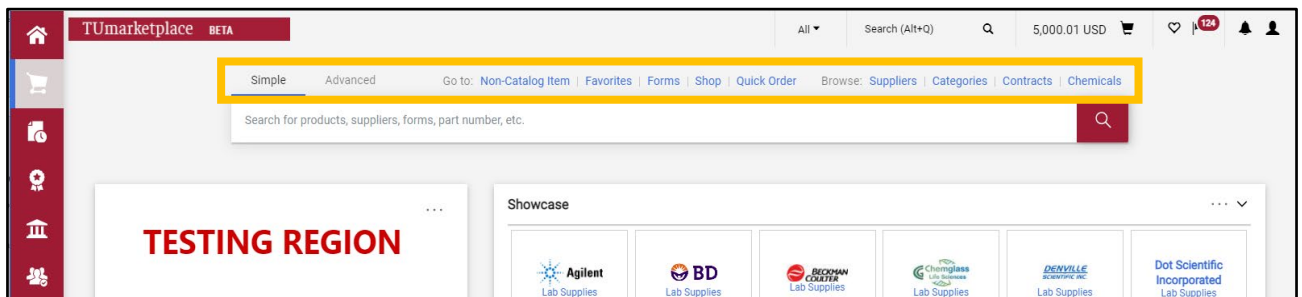
Yellow arrows indicate that the text in the 'TESTING REGION' window points to the corresponding sections in the 'Showcase', 'AP/Purchasing Forms', and 'PunchOut' windows.

1.3. To collapse a window, click on the arrow in the upper right-hand corner of each window.

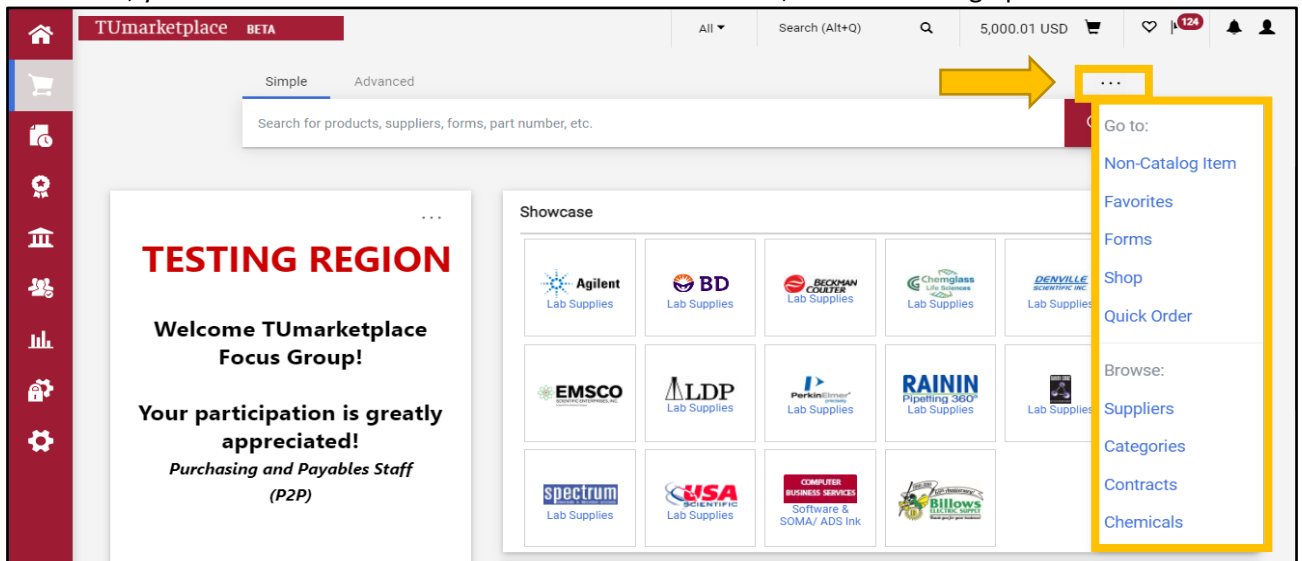


2. Important links on the homepage:

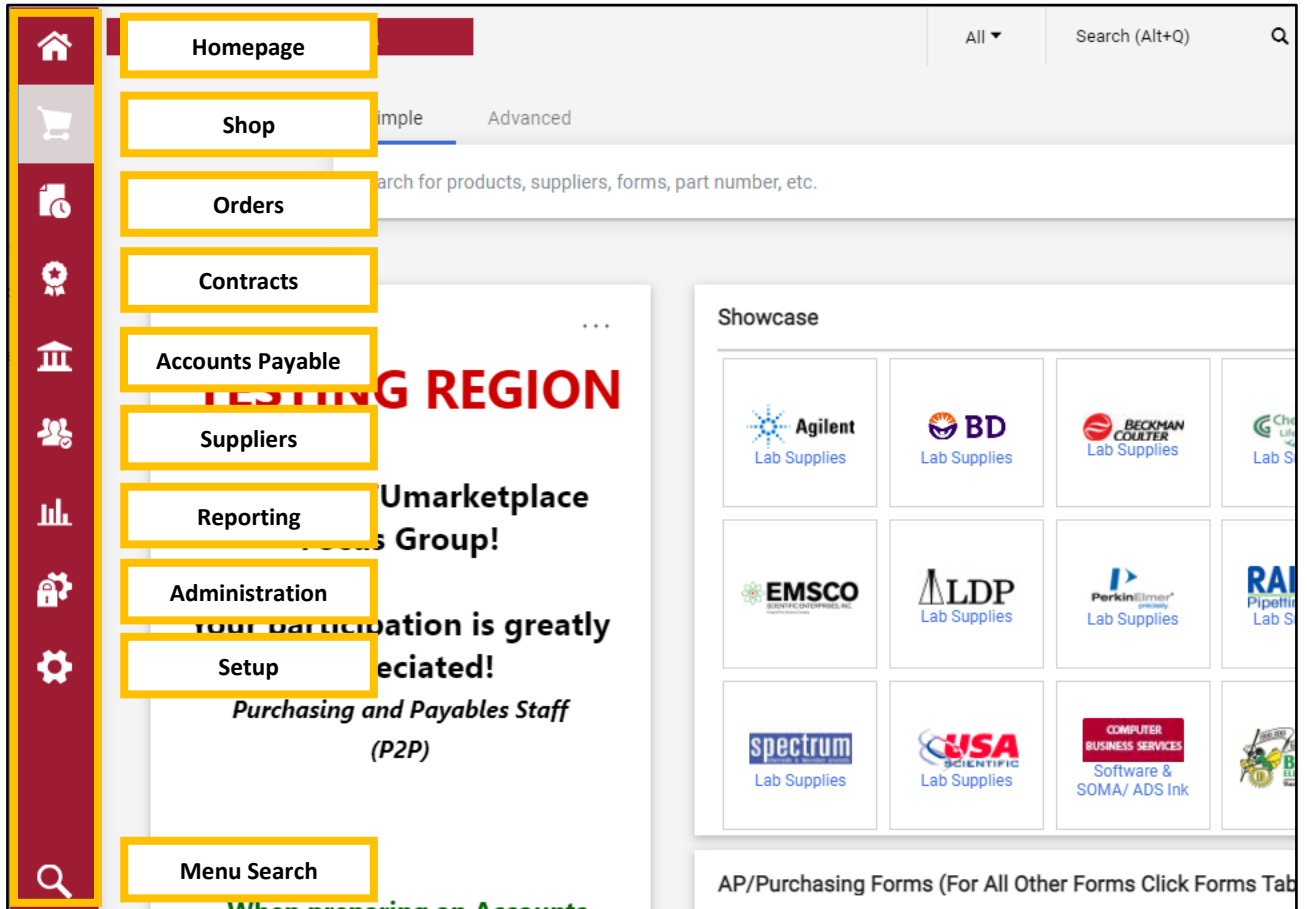
2.1. On the homepage, there are useful links located above the search bar, including one to submit non-catalog requisition and another that will take you to the list of TUmarketplace forms. How these links appear depends on the width of your screen. If there is enough space, these links will appear directly above the search bar.



Otherwise, you must click on the three dots above the search bar, which will bring up the links.



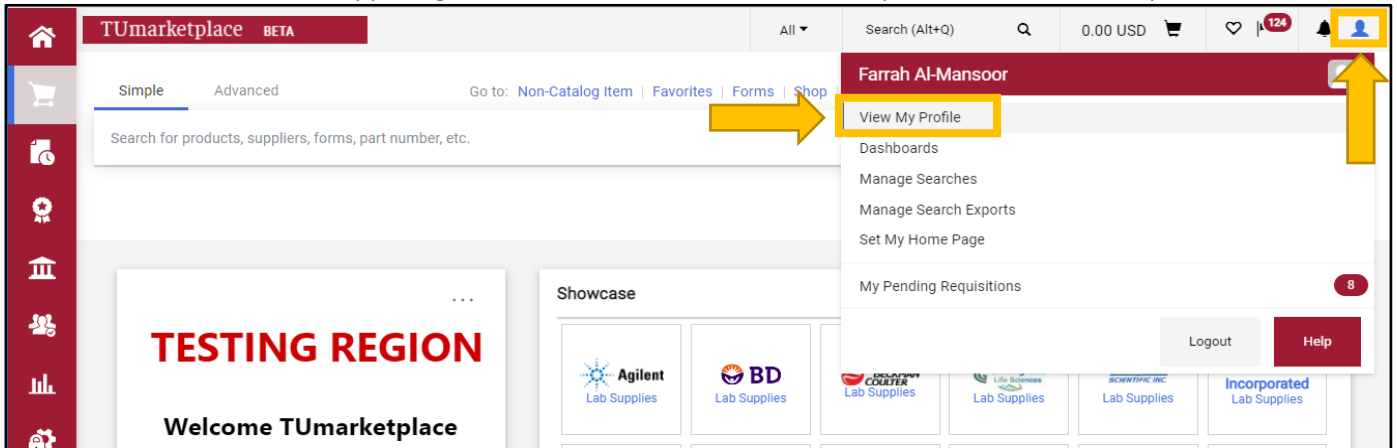
2.2. Another set of helpful links are located down the left-hand side of the screen. Note that these links appear on every TUmarketplace page.



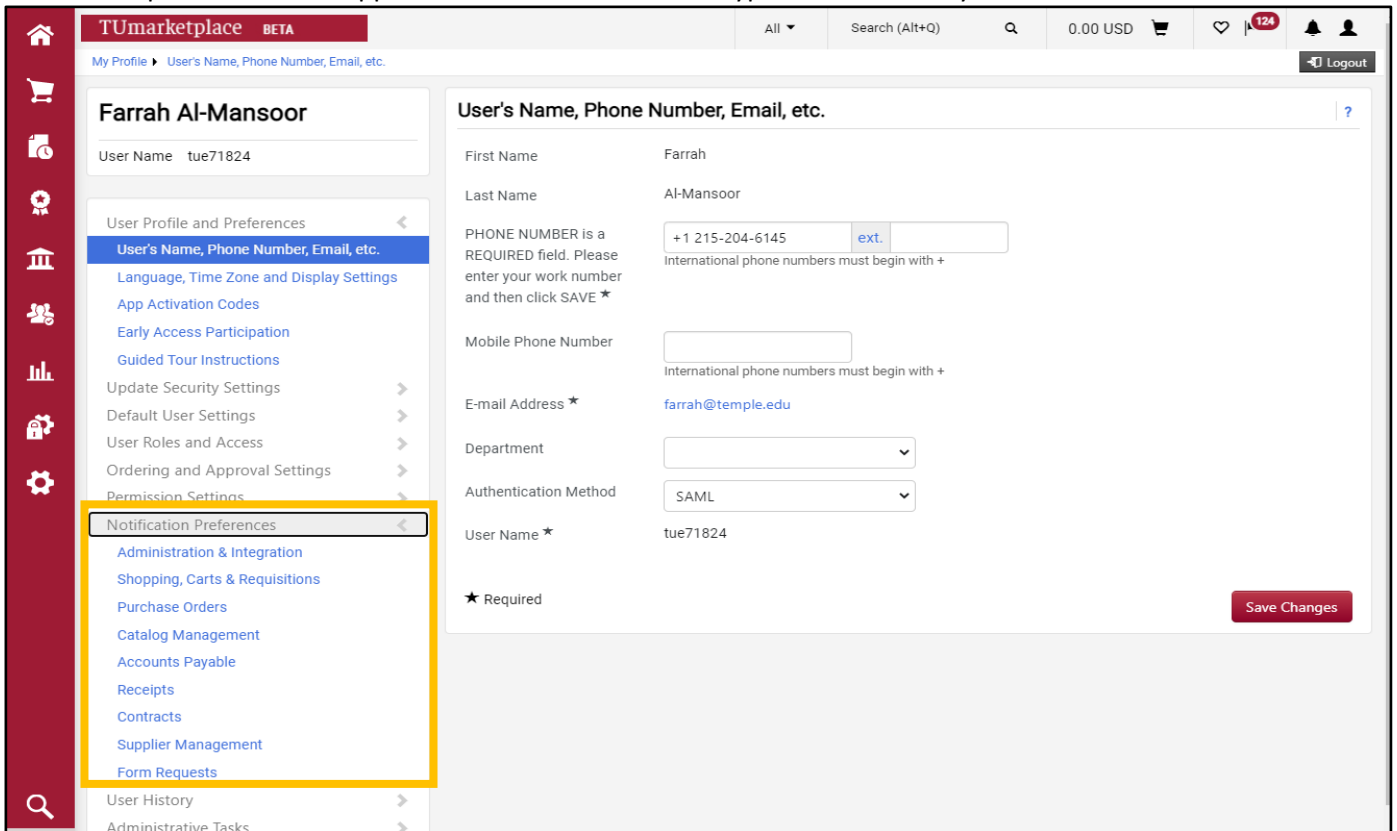
Managing Your Email & Notification Preferences

Purpose: Through the preferences in your TUmarketplace profile, you can set up the parameters dictating when you will receive emails and notifications when certain events occur. These options can help you keep track of the status of orders and other activities that occur in TUmarketplace. This guide demonstrates how to set your email and notification preferences.

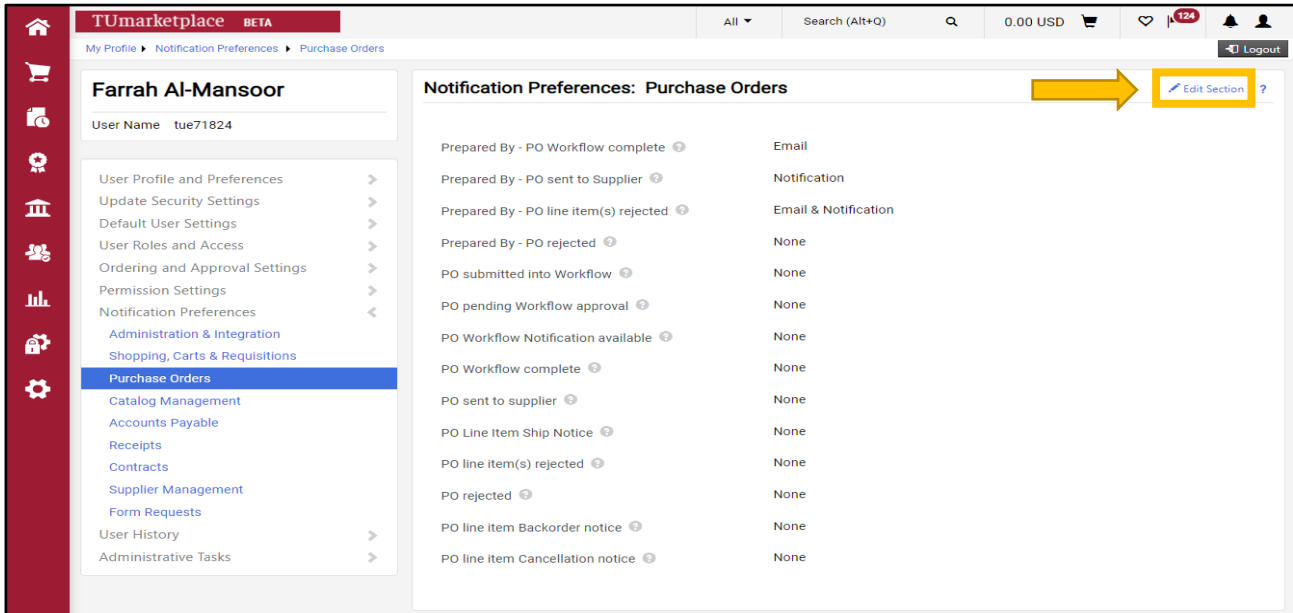
1. Log in to TUmarketplace.
2. Click on the user icon in the upper right-hand corner and choose “View My Profile” from the dropdown.



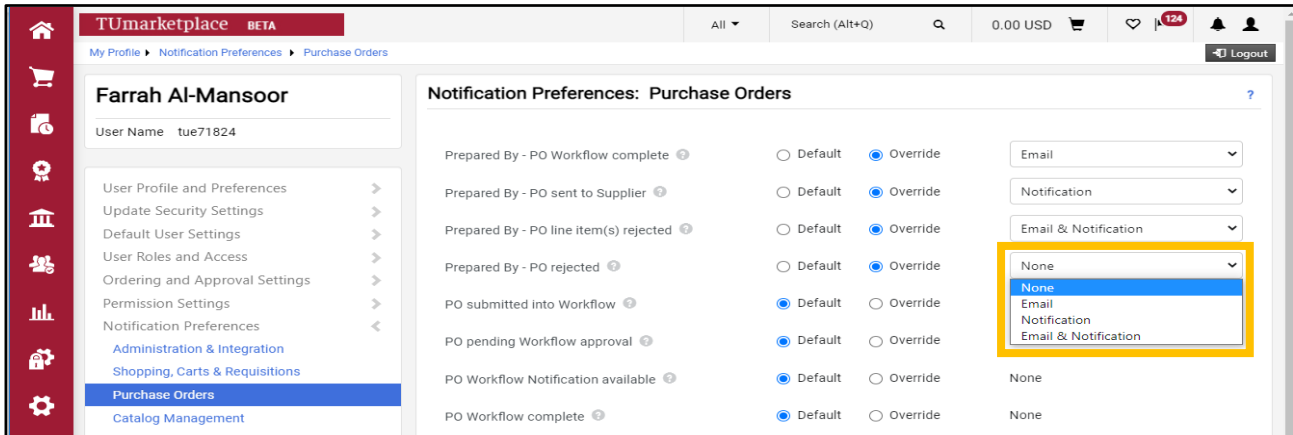
3. Click on the “Notification Preferences” link on the left-hand side of your profile page. The different types of notification preferences will appear. Click on the link for the type of notification you would like to edit.



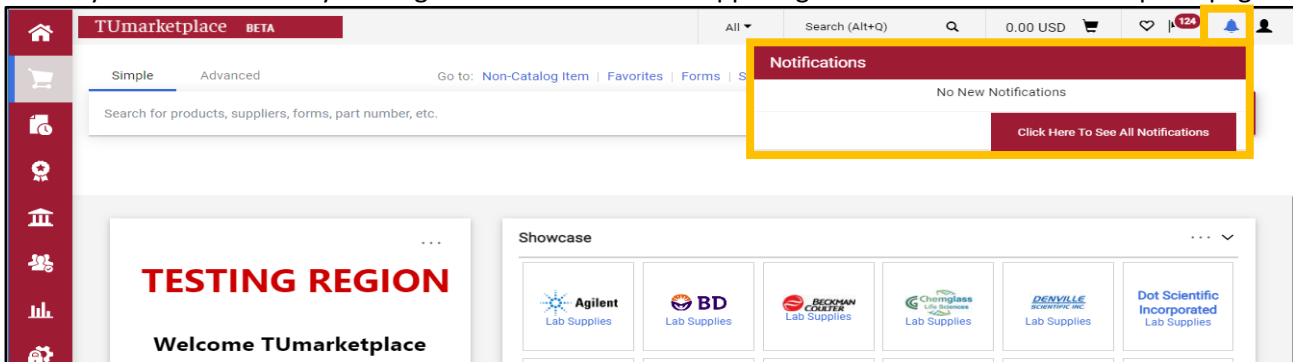
- On the resulting page, you can review the preferences that have been set for the type of notification you selected. Click the “Edit Section” link in the upper right corner to change your preferences.



- Change a selection by clicking on the radio button next to the notification option (“Default” or “Override”). If you select the “Override” option, you will select your contact preference from the dropdown box: “None”, “Email”, “Notification”, and “Email & Notification”.



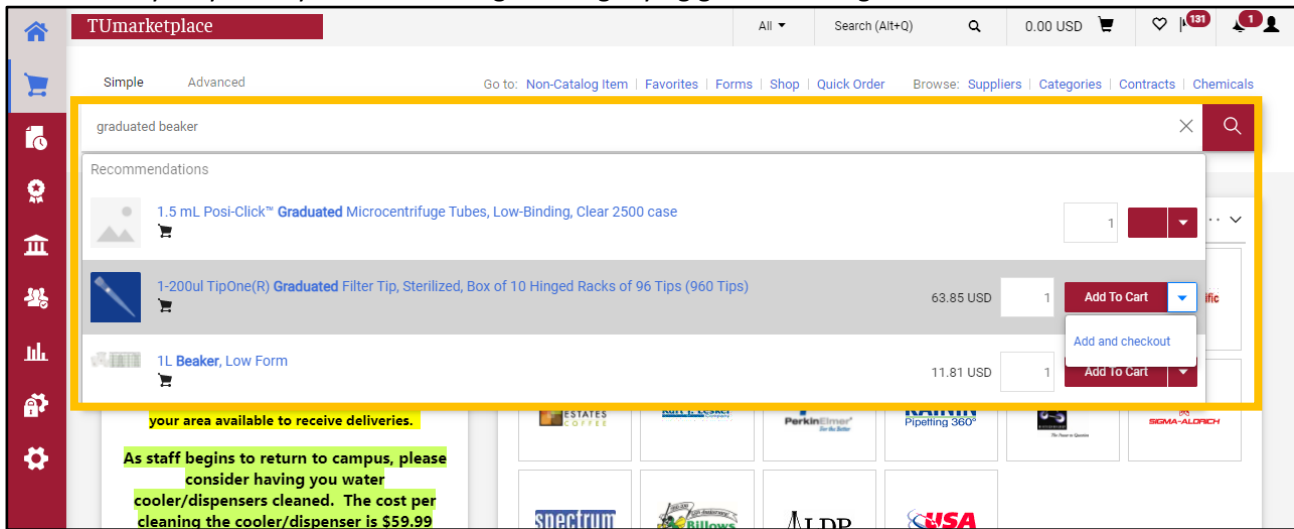
- Access your notifications by clicking on the bell icon in the upper right corner of each TUmarketplace page.



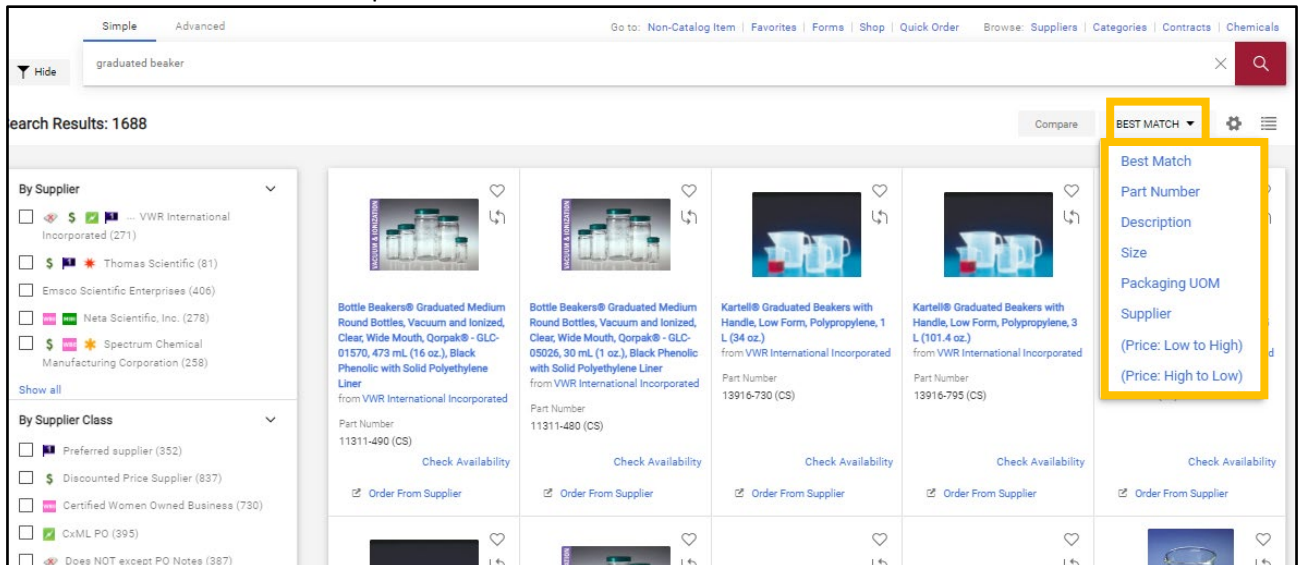
Performing a Simple Search for Products

Purpose: A simple search is helpful when you know the category or description of the product you need but are not sure which vendor sells it. This guide will demonstrate the steps to perform a simple search in TUmarketplace.

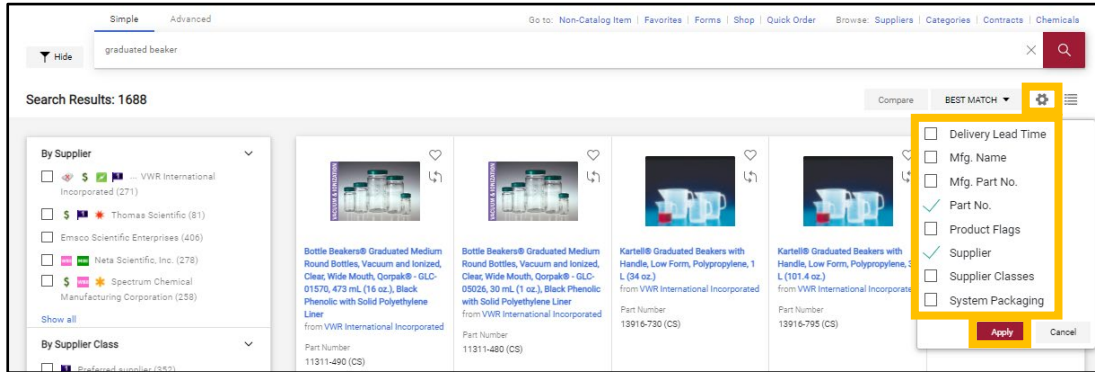
1. Log in to TUmarketplace.
2. Enter the name or description of the product in the large search bar toward the top of the homepage. As you type, recommendations might appear below the search bar. If you see one that might suit your needs, you can click on name of the product to view it or add it directly to your cart. Otherwise, perform the search by pressing the Enter key on your keyboard or clicking the magnifying glass to the right of the search bar.



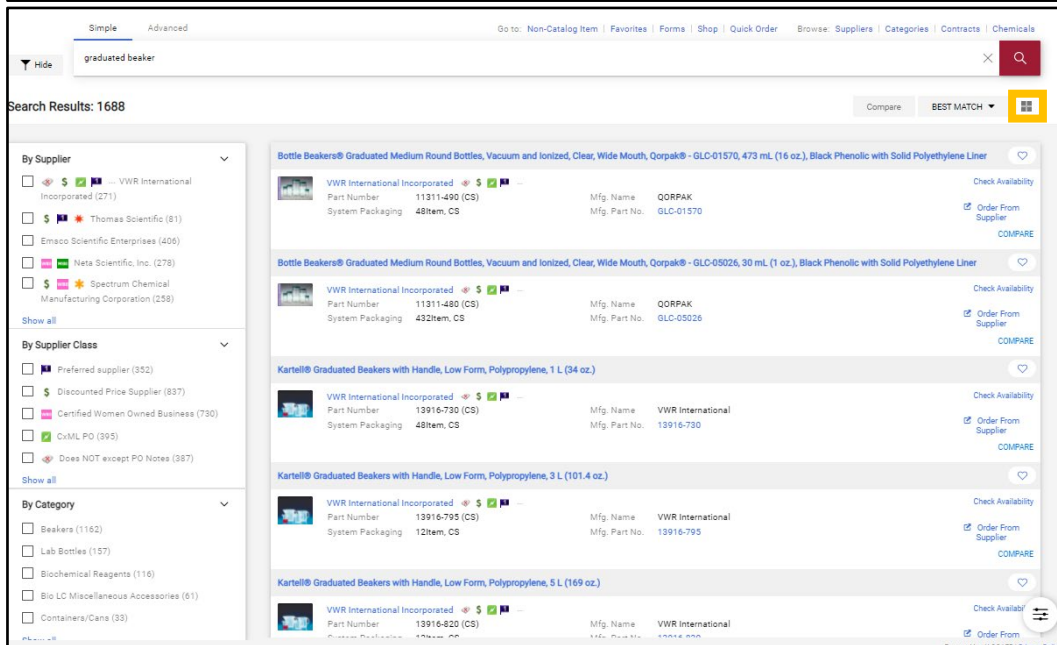
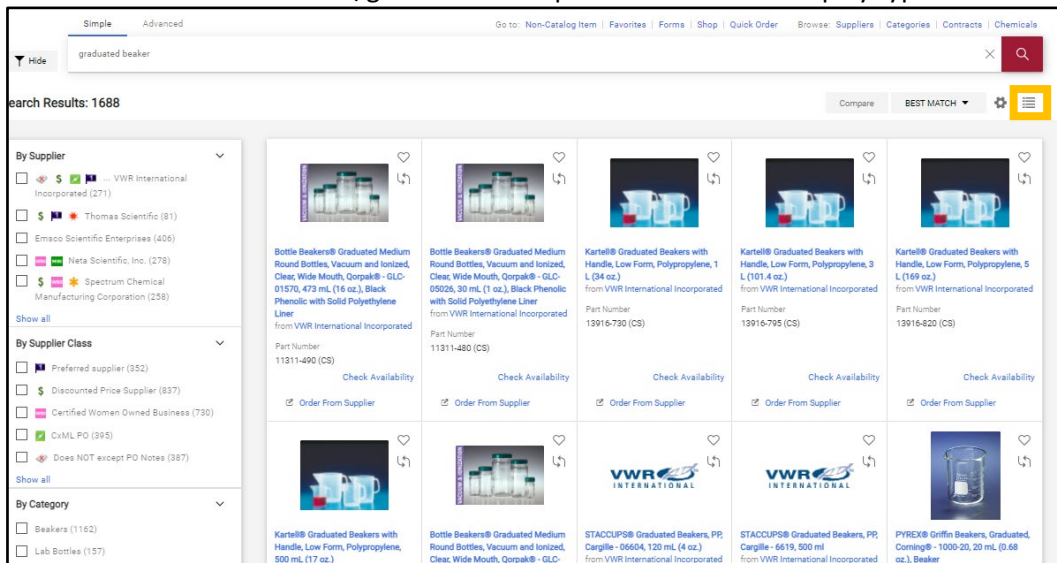
3. The search results will appear. You have a number of options regarding how your search results are displayed:
 - 3.1. Sort order: Select from the dropdown to choose how the results are sorted.



3.2. Product information: Click the gear icon and check the information you wish to have displayed, then click “Apply”.



3.3. Grid vs. list view: Click the list/grid icon to swap between the two display types.



3.4. Comparison: To compare items, make sure you are in list view. Click “Compare” for the items you wish to compare to each other, then click the “Compare” button above the search results.

The screenshot shows a search results page for 'graduated beaker' with 1688 results. On the left, there are filters for 'By Supplier', 'By Supplier Class', and 'By Category'. The main area displays a list of items. Two items have their 'COMPARE' buttons highlighted in yellow:

- Item 1:** Bottle Beakers® Graduated Medium Round Bottles, Vacuum and Ionized, Clear, Wide Mouth, Qorpak® - GLC-01570, 473 mL (16 oz.), Black Phenolic with Solid Polyethylene Liner. Part Number: 11311-490 (CS). Mfg. Name: QORPAK. Mfg. Part No.: GLC-01570.
- Item 2:** Bottle Beakers® Graduated Medium Round Bottles, Vacuum and Ionized, Clear, Wide Mouth, Qorpak® - GLC-05026, 30 mL (1 oz.), Black Phenolic with Solid Polyethylene Liner. Part Number: 11311-480 (CS). Mfg. Name: QORPAK. Mfg. Part No.: GLC-05026.

The 'Compare 2 Items' modal window displays a comparison table for two items. The search term 'cubic feet' is visible at the top. The table compares the following items:

	11311-490 (CS)	11311-480 (CS)
Product Details	Bottle Beakers® Graduated Medium Round Bottles, Vacuum and Ionized, Clear, Wide Mouth, Qorpak® - GLC-01570, 473 mL (16 oz.), Black Phenolic with Solid Polyethylene Liner	Bottle Beakers® Graduated Medium Round Bottles, Vacuum and Ionized, Clear, Wide Mouth, Qorpak® - GLC-05026, 30 mL (1 oz.), Black Phenolic with Solid Polyethylene Liner
Catalog No.	11311-490 (CS)	11311-480 (CS)
Price	Order From Supplier	Order From Supplier
Supplier	VWR International Incorporated	VWR International Incorporated
Category	Labware Washer/Dryer Accessories	Labware Washer/Dryer Accessories

4. Filter your results using the lists at the side, e.g., by supplier or category.

Search Results: 406

Your Selections

- By Supplier: Emasco Scientific Enterprises
- By Supplier: Emasco Scientific Enterprises (406)
- By Category:
 - Beakers (350)
 - Lab Bottles (47)
 - Graduated Cylinders (3)
 - Scoops (3)
 - Lab Brushes (1)
- By Commodity Code: 41000005 (406)
- By Packaging UOM:
 - CS (180)
 - PK (147)
 - EA (74)
 - DZ (5)
- By Result Type: Products (406)

Search Results:

- Beaker, Graduated, Scienceware Griffin low form, Bel-Art, Translucent polypropylene, No-drip spout, Chemical-resistant, Stackable, Autoclavable, Molded-in raised graduations every 500mL, 7.25 in.H, Top OD 6.5 in., Bottom OD 5.25 in., 2000mL, F26217-0000/
 - Part Number: S43498
 - Mfg. Name: Bel Art Products
 - System Packaging: 2000mL EA
 - Mfg. Part No.: F26217-0000/EMD
- Beaker, Plastic, Graduated, Capac. 500mL, BP0500 1/EA
 - Part Number: S63118
 - Mfg. Name: United Scientific Supplies Inc
 - System Packaging: 500mL EA
 - Mfg. Part No.: BP0500
- Beaker, Graduated, SI Metric, Nesting, Plastic, Unbreakable, Easy-to-read blue graduations, Set of five, Includes one beaker of each capacity: 50, 100, 250, 500, and 1000mL, 78390 1/EA
 - Part Number: S95591
 - Mfg. Name: Si Metric Manufacturing Limited
 - System Packaging: 1000mL EA
 - Mfg. Part No.: 78390
- Fisherbrand Graduated Polystyrene Beakers, Capacity: 800 mL, Accuracy: +/-2%, Diameter Base: 3.98 in., 10.1 cm, Diameter op: 5.1 in., 12.9 cm, Disposable: Yes, Graduated: Yes, Height: 4.17 in., 10.59 cm, Includes: Four Way Pour Spout, Temperature Max. Op
 - Part Number: 08732125
 - Mfg. Name: Fisher Scientific
 - System Packaging: 800mL CS
 - Mfg. Part No.: 08732125
- Fisherbrand Graduated Polystyrene Beakers, Capacity: 1000 mL, Accuracy: +/-2%, Diameter Base: 4.02 in., 10.21 cm, Diameter op: 5.35 in., 13.5 cm, Disposable: Yes, Graduated: Yes, Height: 4.25 in., 10.79 cm, Includes: Four Way Pour Spout, Temperature Max.
 - Part Number: 08732126
 - Mfg. Name: Fisher Scientific
 - System Packaging: 1000mL CS
 - Mfg. Part No.: 08732126

5. To view more information about the product, click on its name and a separate window will pop up. You can use the arrows at the top to scroll through the results list.

Beaker, Plastic, Graduated, Capac. 500mL, BP0500 1/EA

larger image

Add Favorite

Product Details

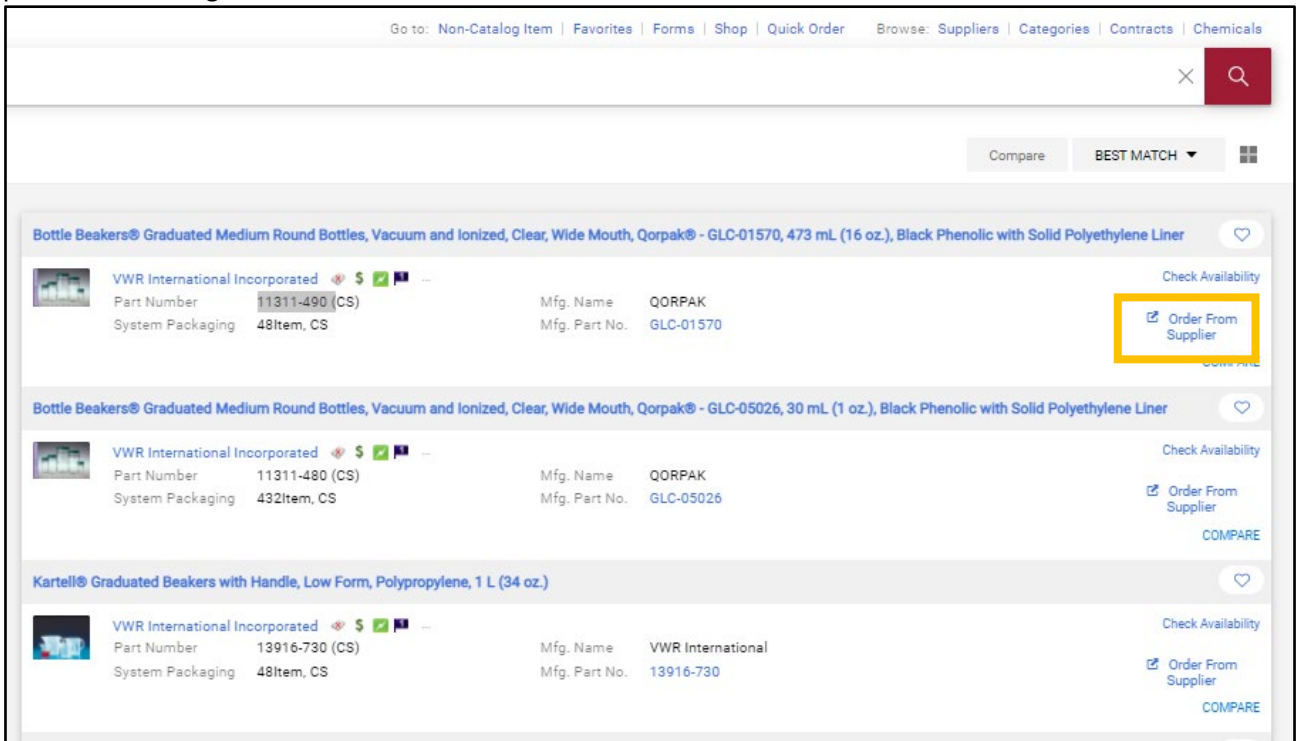
Supplier	Emsco Scientific Enterprises	Supplier UOM	EA
Supplier Size	500mL	Buyer UOM	EA
Buyer Size	500mL	Part Number	S63118
Manufacturer Name	United Scientific Supplies Inc	Manufacturer Part Number	BP0500
System Product Size	500mL	Category	Beakers
Category UNSPSC	41-12-18-03	Color	
Image URL	https://assets.fishersci.com/TFS...	Lead Time	7
More Information URL	https://fishersci.com/itemdetail...	UNSPSC	41-12-18-03

Beaker, Plastic; Graduated; Capac. 500mL

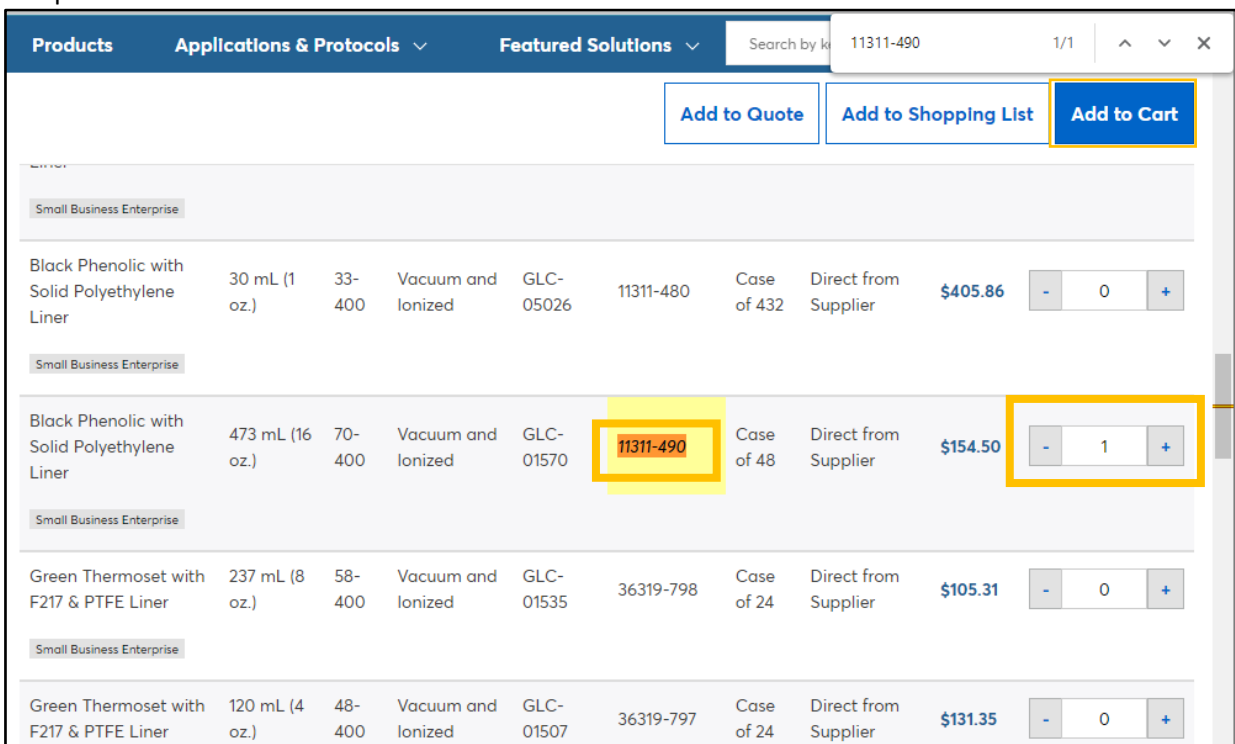
EA Order from Supplier

6. If, after you have reviewed the search results, you find an item you would like to purchase, you can add it to your cart.

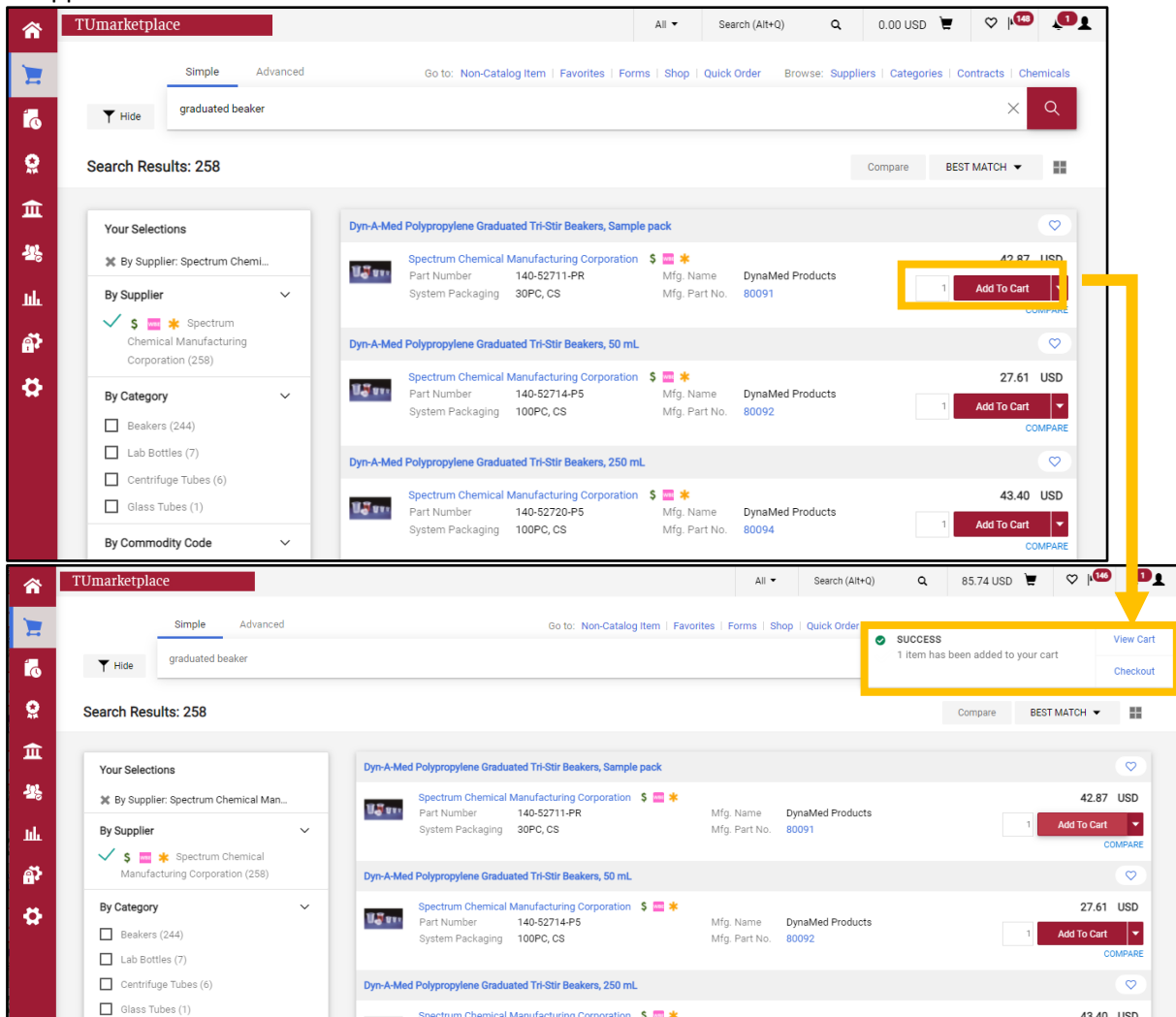
6.1. If the item is sold by a punch-out supplier, click “Order from Supplier” – you will be taken to the supplier’s punch-out catalog.



The supplier’s punch-out catalog will appear in a pop-up window. Use the part number to find the correct item, enter the quantity, and click “Add to Cart”. See the “Placing a Punch-Out Order” guide for the steps to complete the order.

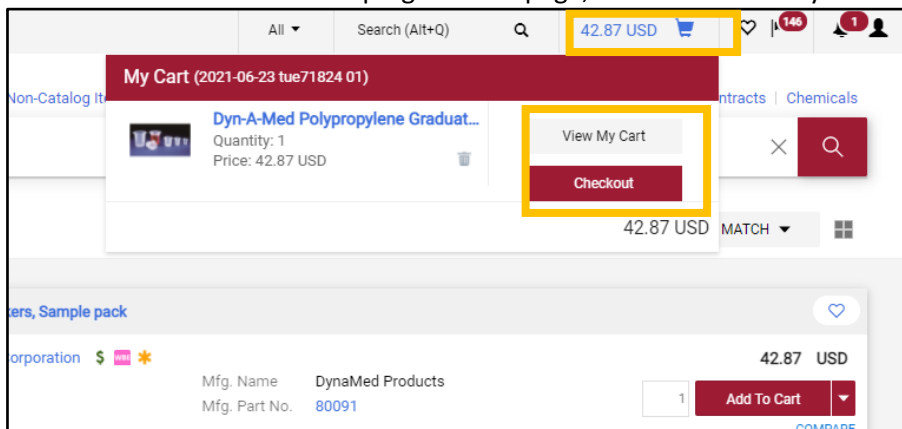


6.2. If the item is sold by a showcased supplier, enter the desired quantity and click “Add to Cart”. A notification will appear confirming that the item has been added to your cart. Click “View Cart” to see the items in your cart or “Checkout” if you wish to check out. Otherwise, continue shopping and the notification will disappear in a few seconds.

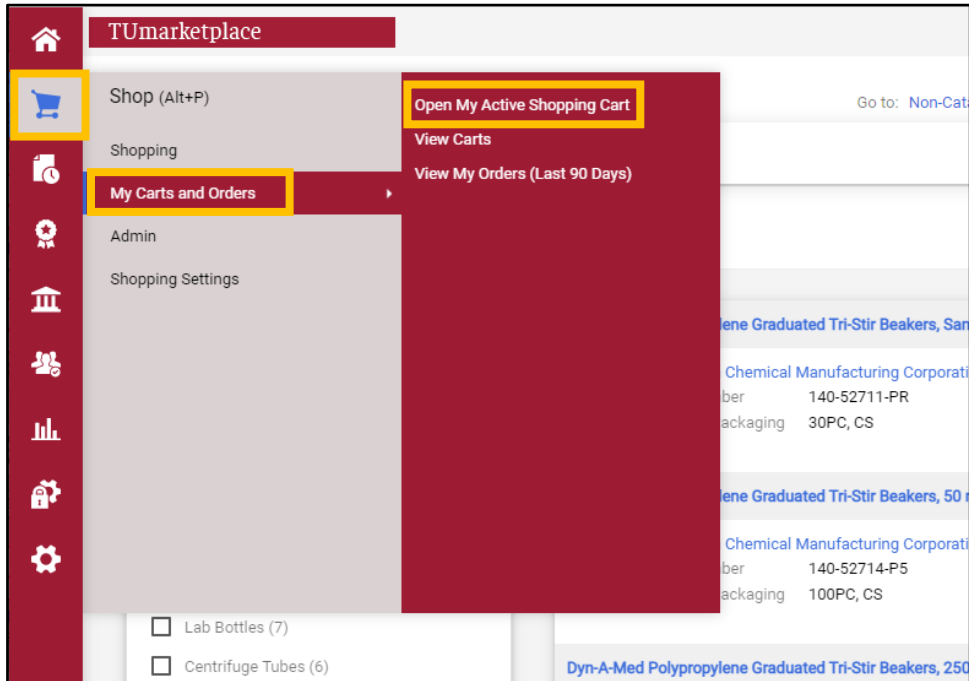


7. Once you are finished shopping, you can navigate to your cart to check out. You can access your cart in one of two ways:

7.1. Click on the cart icon at the top right of the page, and click “View My Cart” or “Checkout”.



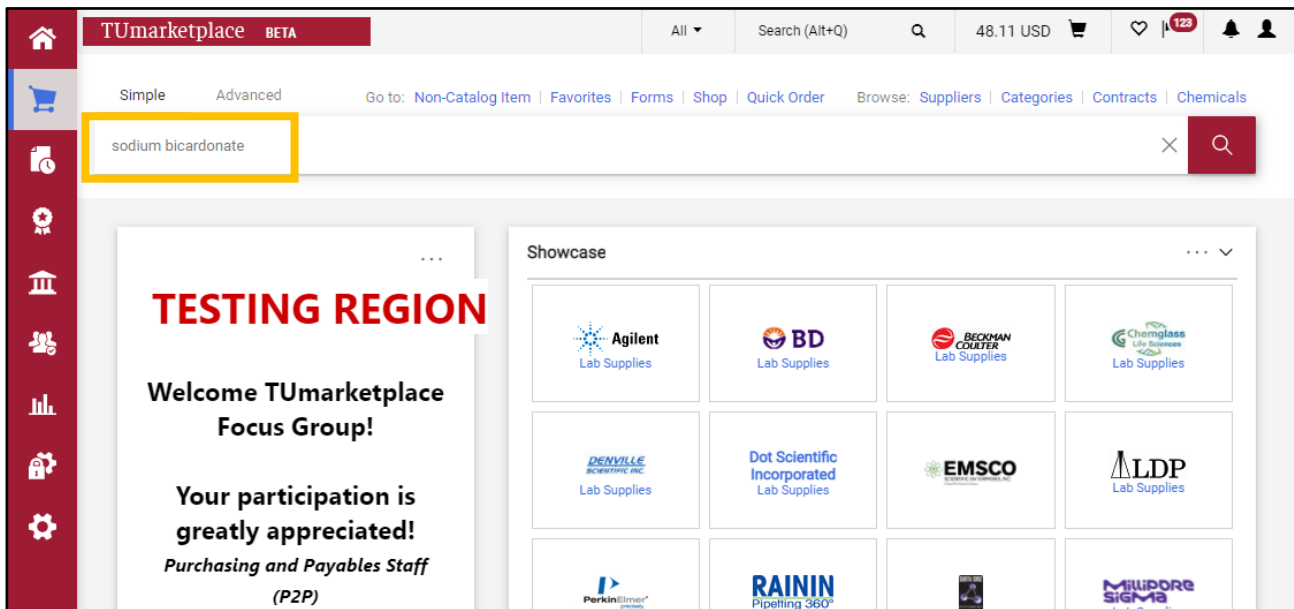
7.2. Hover over the cart icon at the left side of the screen, hover over “My Carts and Orders”, and click on “Open My Active Shopping Cart.”



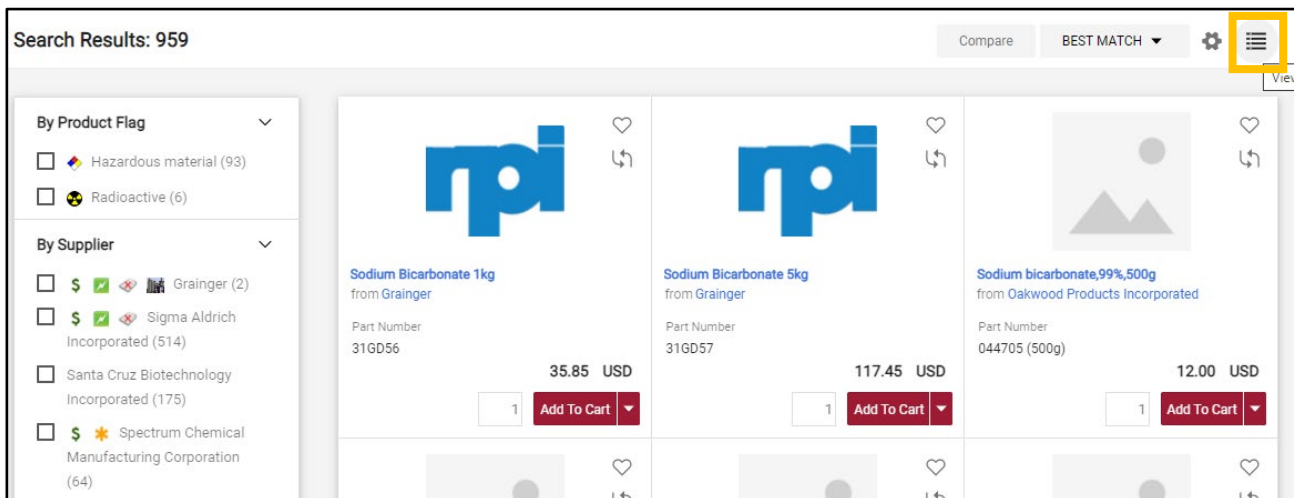
Comparing Products Side by Side

Purpose: When shopping for products, one of the best ways to make sure you are getting exactly what you are looking for at the best price is by using side-by-side comparisons. By utilizing TUmarketplace’s extensive comparison feature, you can do just that. This guide will show you how to do a side-by-side comparison in TUmarketplace.

1. Log in to TUmarketplace.
2. Use the search feature in TUmarketplace to locate the items you are looking to purchase.



3. Make sure you are viewing the results in list view; if you are in grid view, click the list icon to the upper right of the search results.



- Click on the "COMPARE" link next to the items you'd like to compare, then click on the "Compare" button located above the search results.

Search Results: 959 2 Compare BEST MATCH

By Product Flag

- Hazardous material (93)
- Radioactive (6)

By Supplier

- Grainger (2)
- Sigma Aldrich Incorporated (514)
- Santa Cruz Biotechnology Incorporated (175)
- Spectrum Chemical Manufacturing Corporation (64)
- MP Biomedicals LLC (37)

[Show all](#)

By Supplier Class

- E&I Supplier (2)
- Discounted Price Supplier (582)

Sodium Bicarbonate 1kg		35.85 USD	
	Grainger Part Number: 31GD56 System Packaging: EA	Mfg. Name: RPI Mfg. Part No.: S2206010000	1 <input type="button" value="Add To Cart"/> <input type="button" value="COMPARE"/>
Sodium Bicarbonate 5kg		117.45 USD	
	Grainger Part Number: 31GD57 System Packaging: EA	Mfg. Name: RPI Mfg. Part No.: S2206050000	1 <input type="button" value="Add To Cart"/> <input type="button" value="COMPARE"/>
Sodium bicarbonate,99%,500g		12.00 USD	
	Oakwood Products Incorporated Part Number: 044705 (500g) System Packaging: 500g, EA	Science Catalog Supplier Mfg. Name: Oakwood Products, Inc. Mfg. Part No.: 44705	1 <input type="button" value="Add To Cart"/> <input type="button" value="COMPARE"/>
Sodium bicarbonate,99%,100g		10.00 USD	
	Oakwood Products Incorporated Part Number: 044705 (100g) System Packaging: 100g, EA	Science Catalog Supplier Mfg. Name: Oakwood Products, Inc. Mfg. Part No.: 44705	1 <input type="button" value="Add To Cart"/> <input type="button" value="COMPARE"/>

- A pop-up window comparing your selected items will appear.

Compare 3 Items ✕

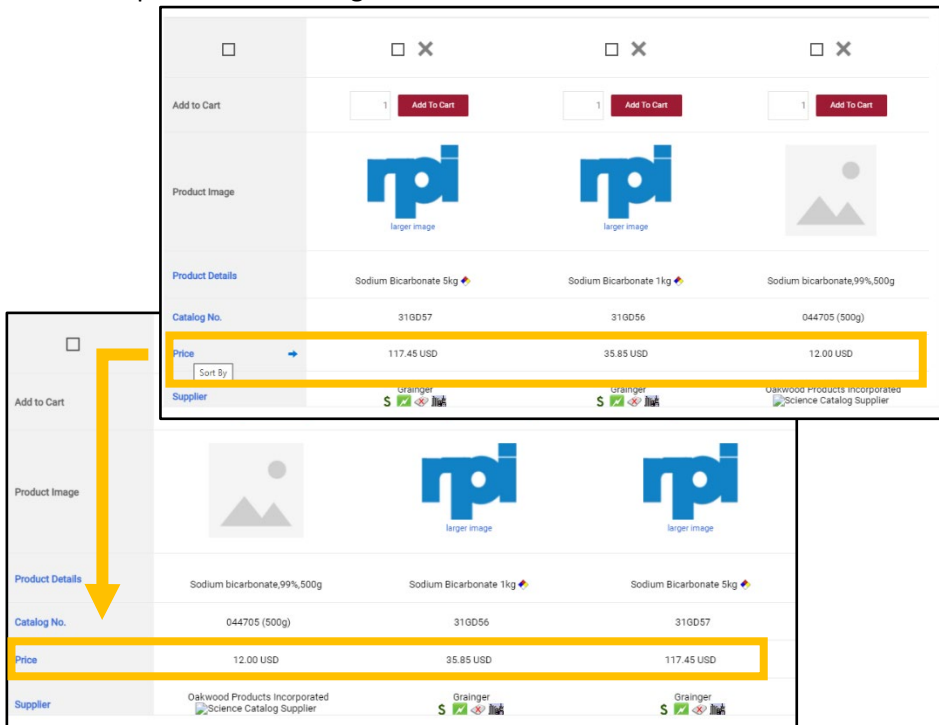
oz

ACTIONS FOR 0 SELECTED ITEMS

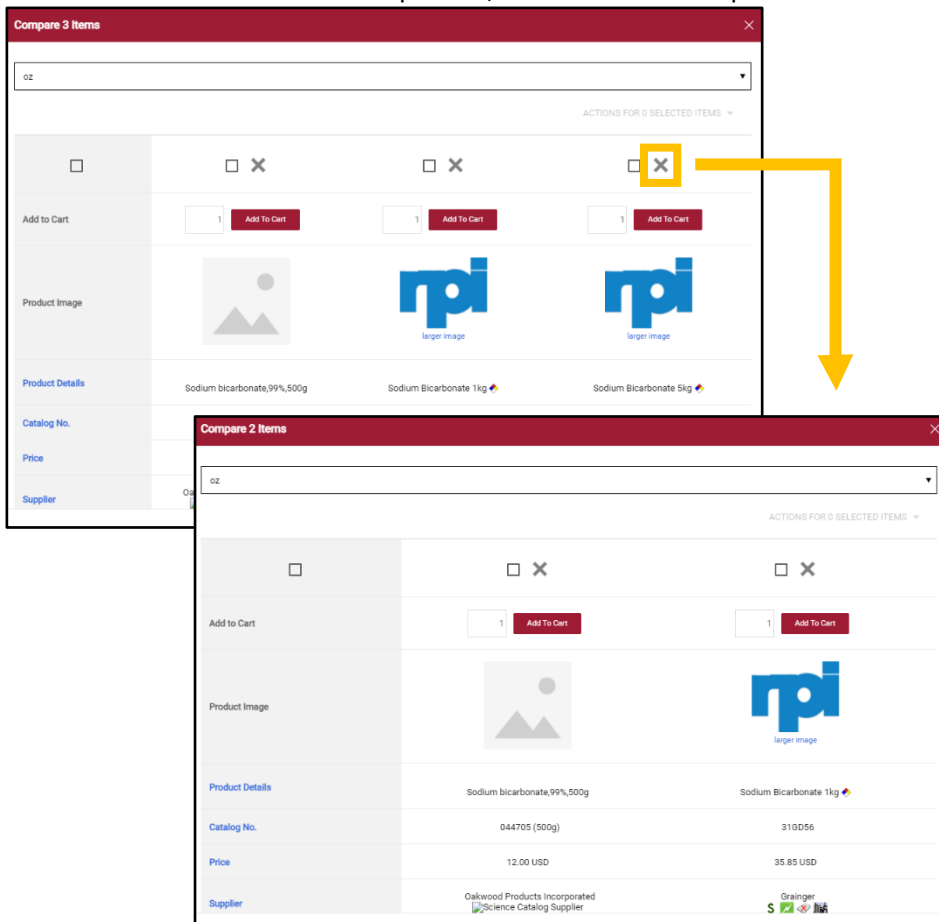
	<input type="checkbox"/>	<input type="checkbox"/> ✕	<input type="checkbox"/> ✕
Add to Cart	1 <input type="button" value="Add To Cart"/>	1 <input type="button" value="Add To Cart"/>	1 <input type="button" value="Add To Cart"/>
Product Image	 larger image	 larger image	
Product Details	Sodium Bicarbonate 5kg	Sodium Bicarbonate 1kg	Sodium bicarbonate,99%,500g
Catalog No.	31GD57	31GD56	044705 (500g)
Price	117.45 USD	35.85 USD	12.00 USD
Supplier	Grainger 	Grainger 	Oakwood Products Incorporated

electronically (516) Sodium Bicarbonate, 99%, 500g

- Along the left column of the comparison window, you will see all the comparable attributes. Click on an attribute to sort the products according to that value.

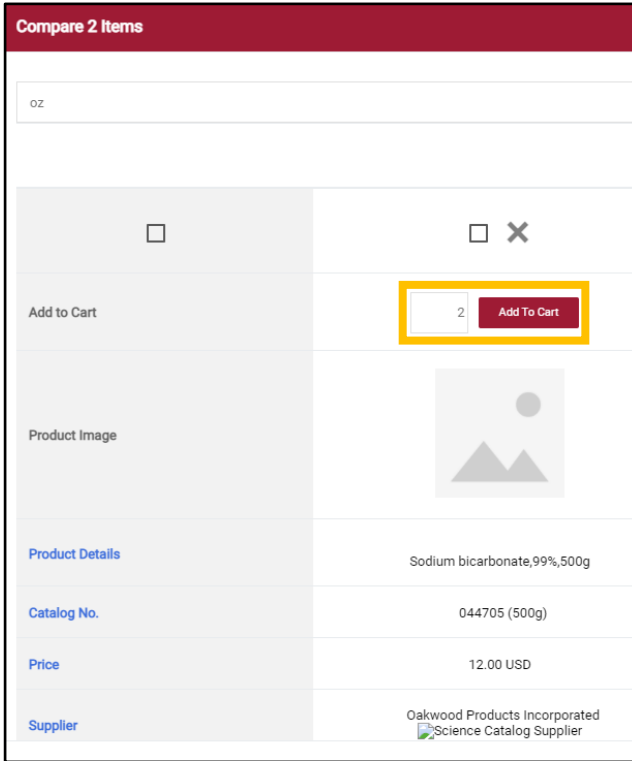


- To remove an item from the comparison, click the X at the top of the column.

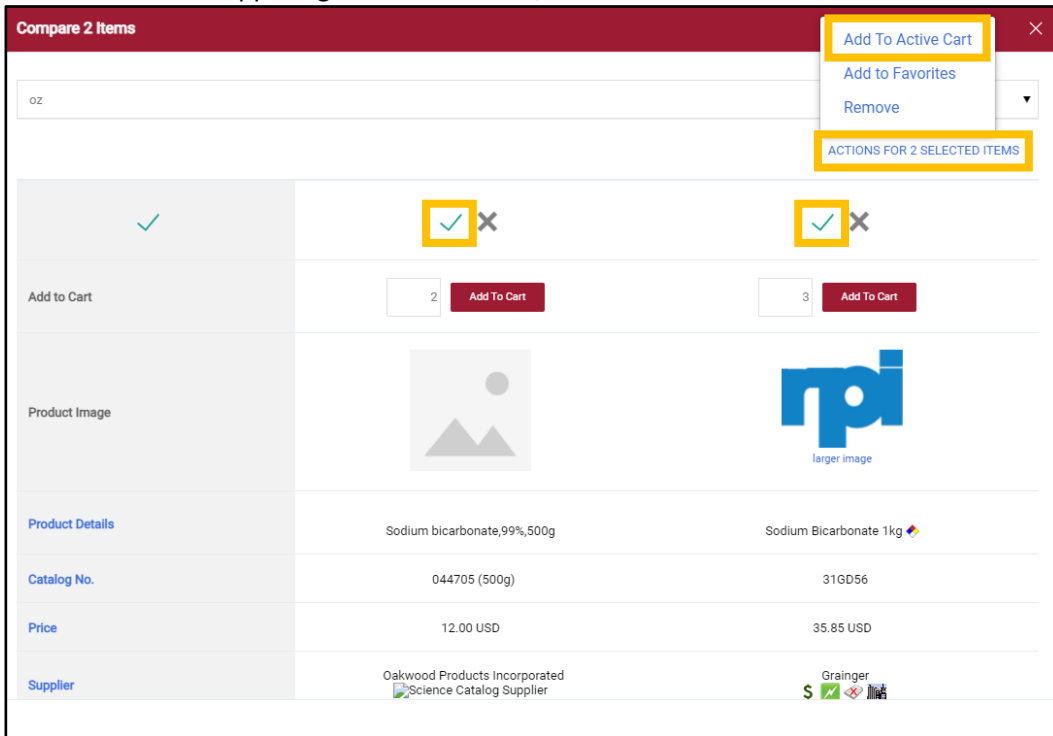


8. To add an item to your cart, do one of the following:

8.1. To add a single item to your cart, enter the quantity desired and click the “Add To Cart” button at the top of the column.



8.2. To add multiple items to your cart, check the box above the columns, click the “ACTIONS FOR # SELECTED ITEMS” link at the upper right of the window, and click “Add To Active Cart”.

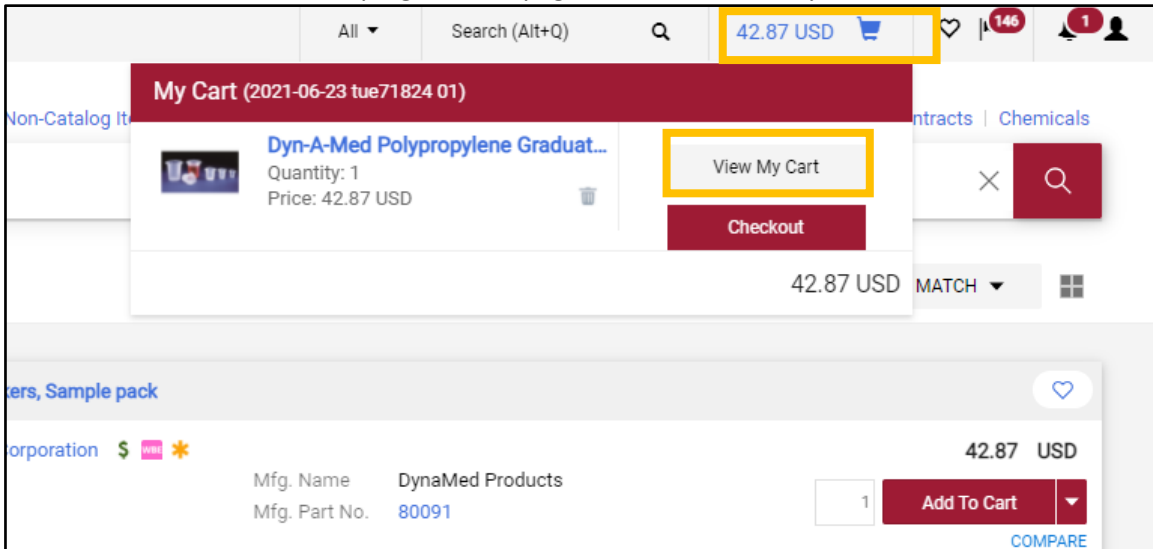


Placing an Order and Assigning a Cart

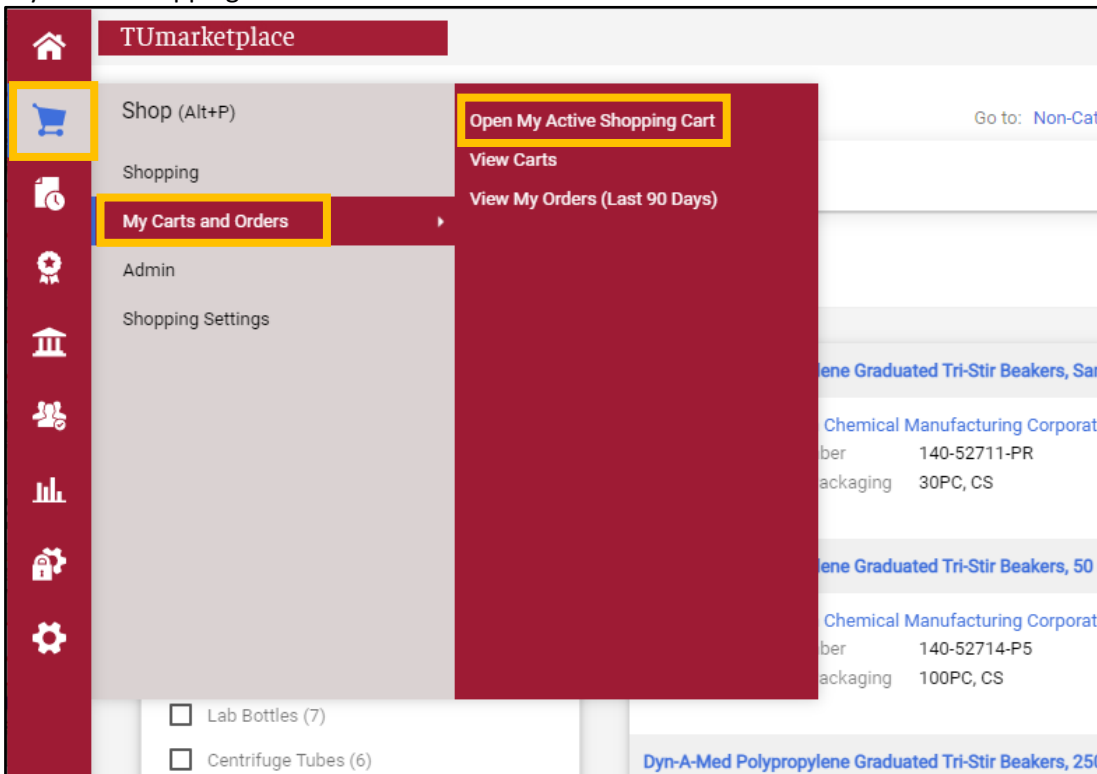
Purpose: Once you have completed adding items to your cart, the cart can be assigned, or you may place the order yourself. This document explains how.

1. Once you have placed an item in your cart, go to the cart by doing one of the following:

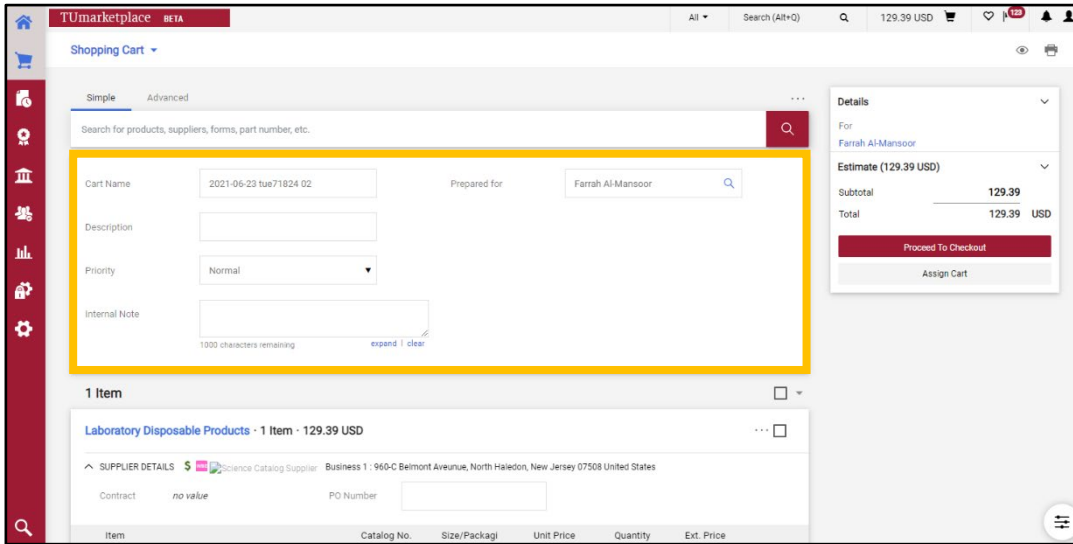
1.1. Click on the cart icon at the top right of the page, and click “View My Cart”.



1.2. Hover over the cart icon at the left side of the screen, hover over “My Carts and Orders”, and click on “Open My Active Shopping Cart.”



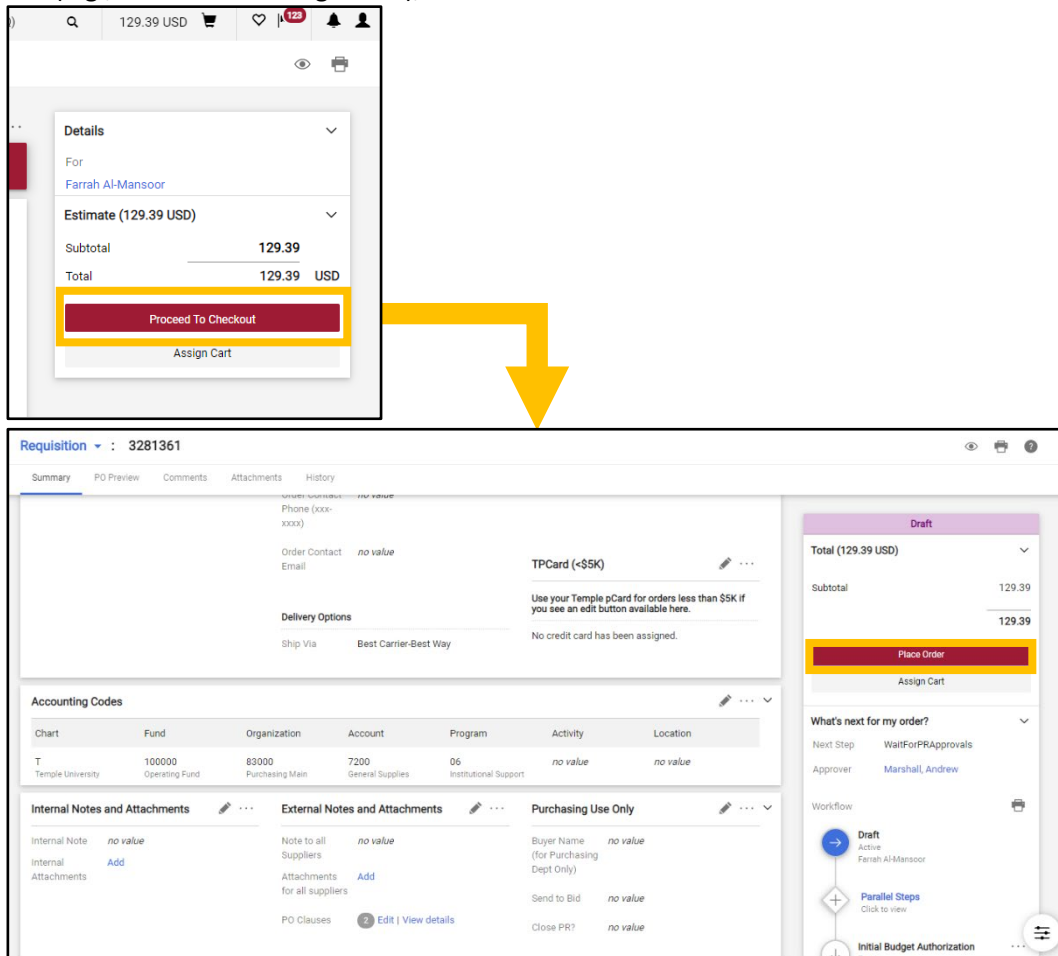
- From your shopping cart, you can update the cart name, add a description or internal note, set the priority as normal or urgent, or indicate who the cart is for (if someone other than yourself).



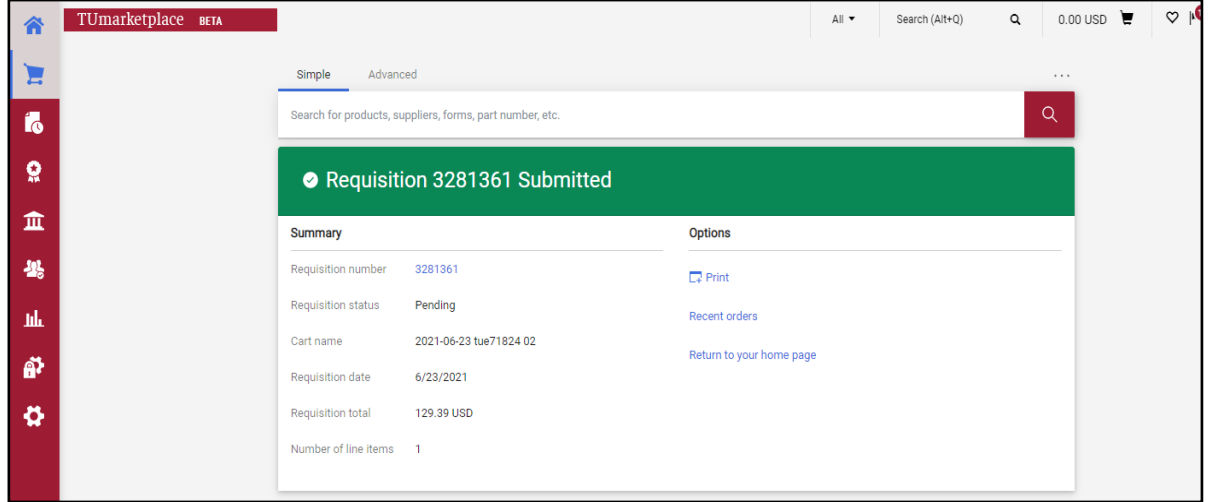
Next, you can either check out yourself, or assign the cart to someone else.

2.1. To check out yourself:

- 2.1.1. Click “Proceed To Checkout”. You will be taken to the draft requisition. Make any updates to the order (e.g., to the accounting codes), and then click “Place Order”.

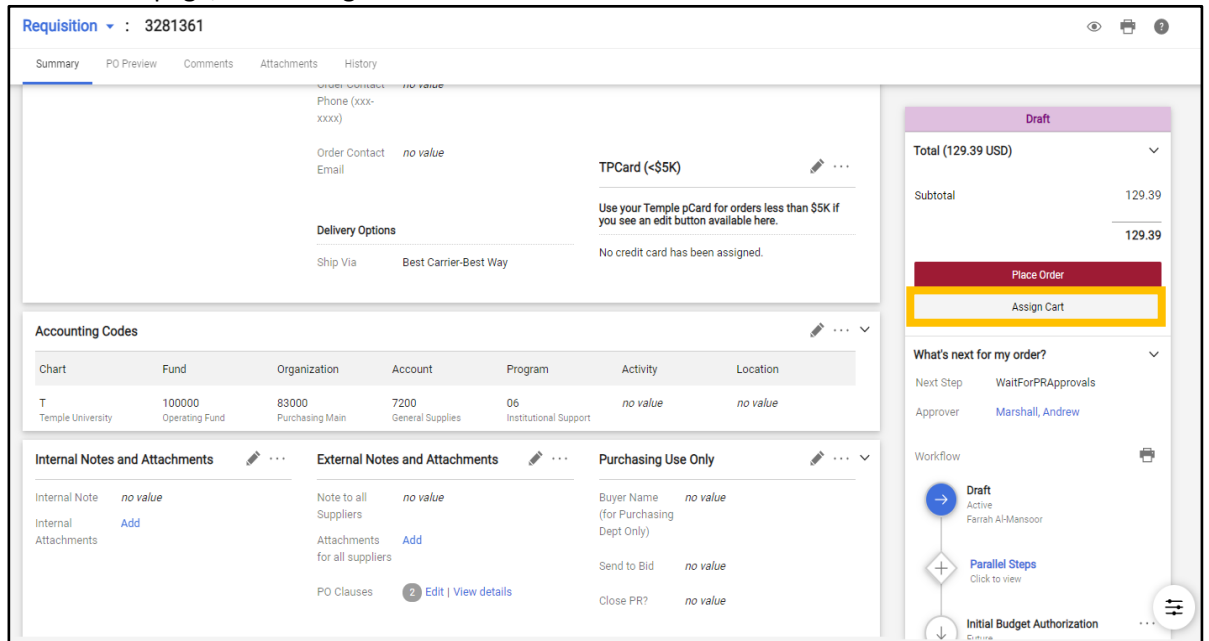


2.1.2. A confirmation page will appear.

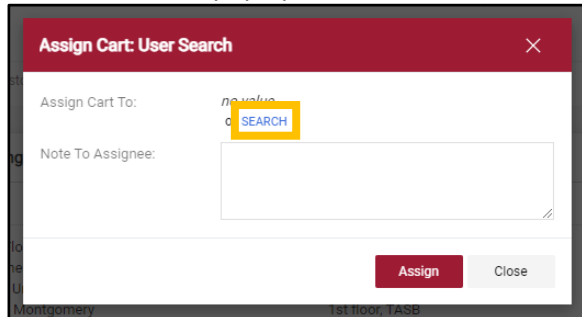


2.2. Instead of placing the order yourself, you can assign it to someone else. You can do so either from your cart, or from the draft requisition page (see step a above).

2.2.1. From either page, click “Assign Cart”.



2.2.2. A search box will pop up. Click “SEARCH” to search for the person you wish to assign the cart to.



2.2.3. Another user search box will appear. Enter the search criteria, and click “Search”.

User Search [X]

Last Name [Muller]

First Name []

User Name []

Email []

Department []

Role []

Results Per Page [10]

[Search] [Close]

2.2.4. On the results list, find the correct person and click the plus icon next to their name.

User Search [X]

[New Search]

Name ^	User Name	Email	Phone	Action
MULLER, LESLIE	lmuller	lmuller@temple.edu	+1 215-707-3874	[+]
Muller, Jennifer	robbins	jmuller@temple.edu	+1 215-204-0699	[+]

[Close]

2.2.5. Enter a note to the assignee if you wish, then click “Assign”.

Assign Cart: User Search [X]

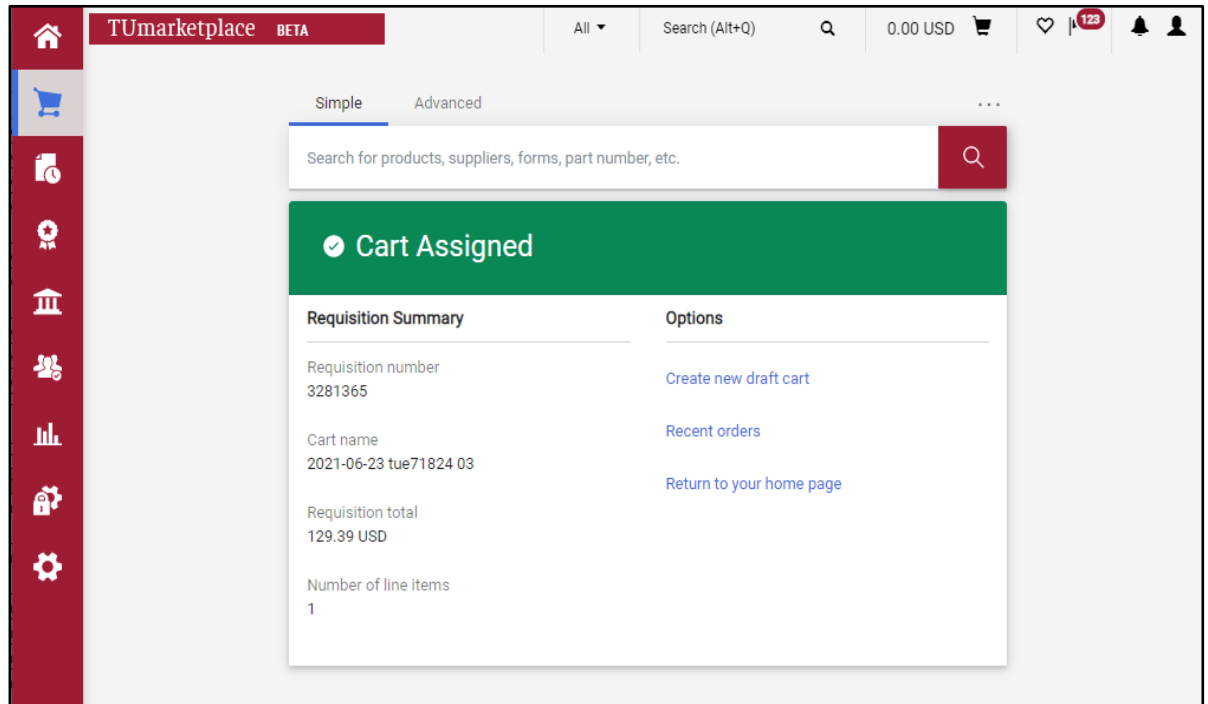
Assign Cart To: MULLER, LESLIE or SEARCH

Add to Profile

Note To Assignee: []

[Assign] [Close]

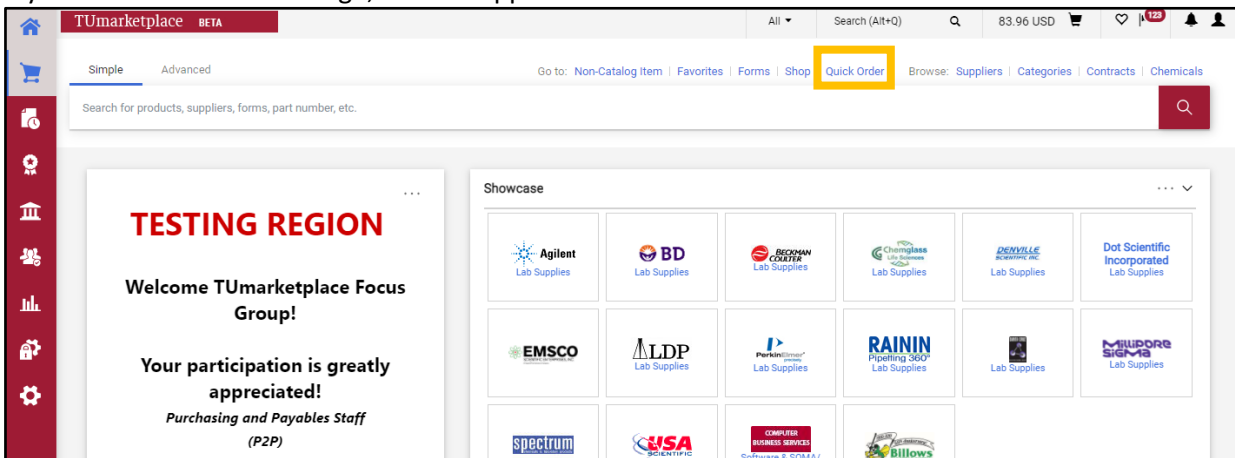
2.2.6. A confirmation page will appear.



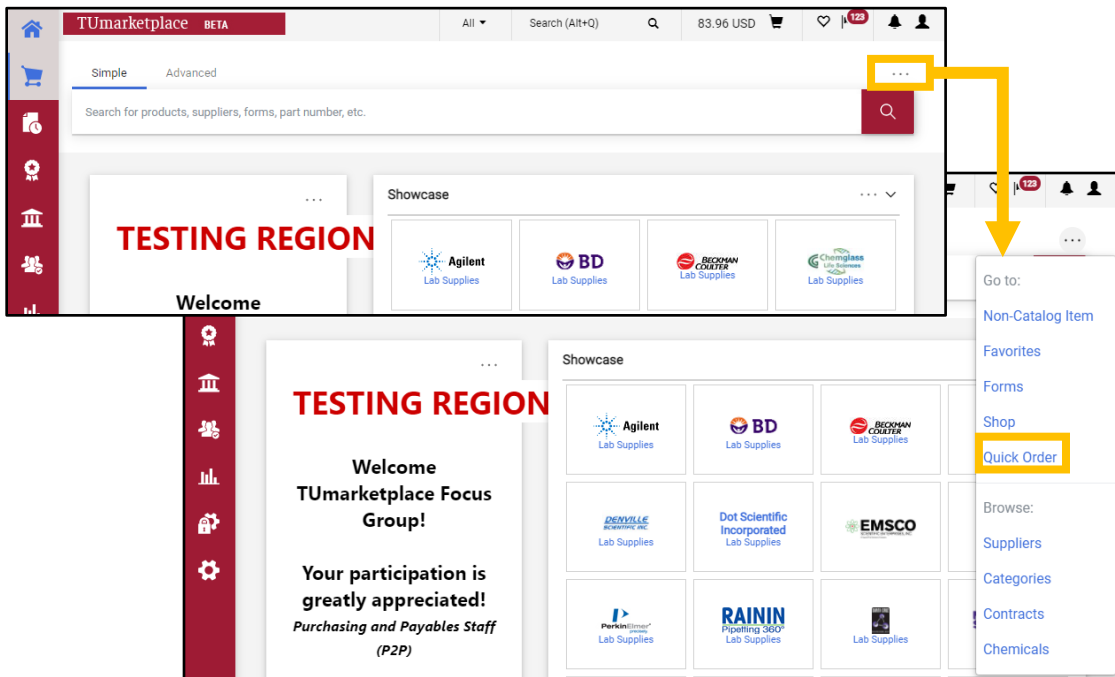
Placing a Quick Order

Purpose: The Quick Order functionality allows users to enter and search for up to five product catalog number(s) and, if exact matches are found, the items are automatically added to the cart. This functionality works with all hosted and some punch-out catalogs.

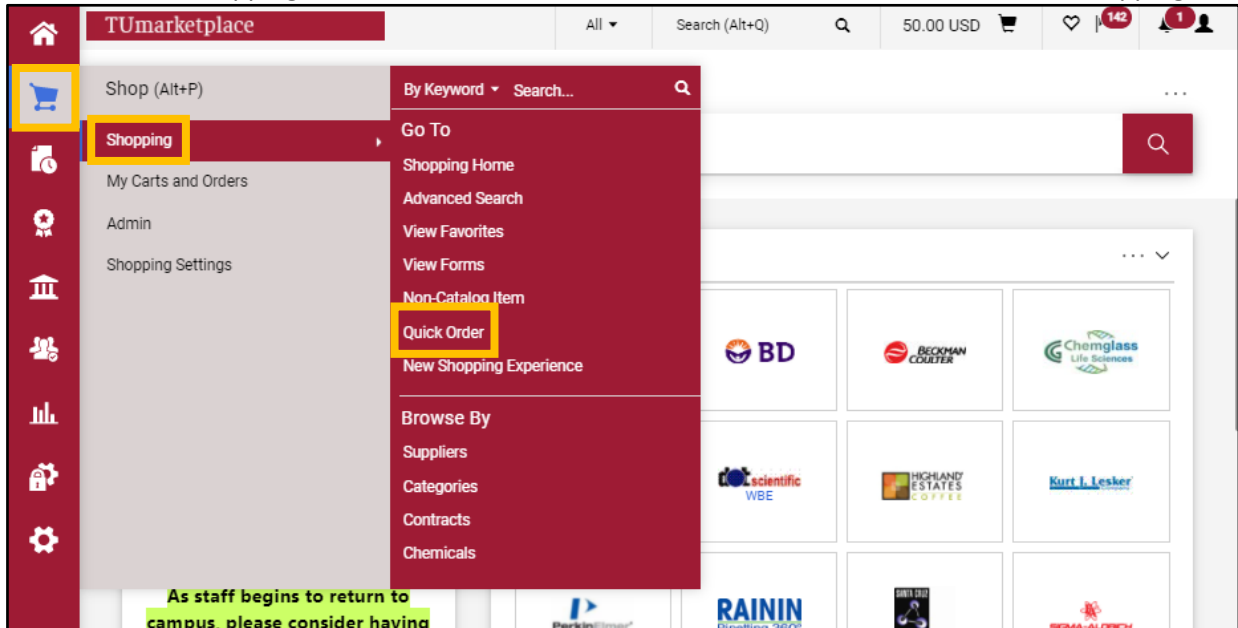
1. Log in to TUmarketplace.
2. Navigate to the Quick Order page in one of the below ways:
 - a. If your window is wide enough, this will appear above the search bar.



- b. If your window is too small, you must click the three dots above the search bar, and then click the “Forms” link.



- c. Hover over the shopping cart icon at the left of the screen and click “Quick Order” in the “Shopping” section.



3. On the Quick Order screen, select the category from the dropdown menu that best relates to the product(s) you are trying to locate.

Note: The default setting of “Everything” will search across all categories throughout the entire database of TUmarketplace’s hosted

4. Enter the catalog or part number for the item(s) you wish to purchase and press Enter on your keyboard. Note: When entering catalog or product numbers make sure you are entering the correct information. If your SKU has a hyphen in it and you enter the number without the hyphen, your search will return your results without the desired item. In the below example, the same product number is entered twice, the first time without the hyphen and the second time with the hyphen.
 - 4.1. The correct part number shows the desired item and confirms that it has been successfully added to the TUmarketplace cart.
 - 4.2. The result for the incorrect part number offers a second search of similar results, from which you can add the item to your cart.

The image illustrates the search process on TUmarketplace. It shows three sequential screenshots. In the first, the search bar contains '96126624E1'. In the second, the search results for '96126624E1' are shown, with a red box around the 'Multiple or similar results returned' message and a yellow box around the 'Search' button. In the third, the search results for '961-26624-E1' are shown, with a yellow box around the 'Add To Cart' button. Yellow arrows indicate the flow of the process from the input field to the search button, then to the search results, and finally to the 'Add To Cart' button.

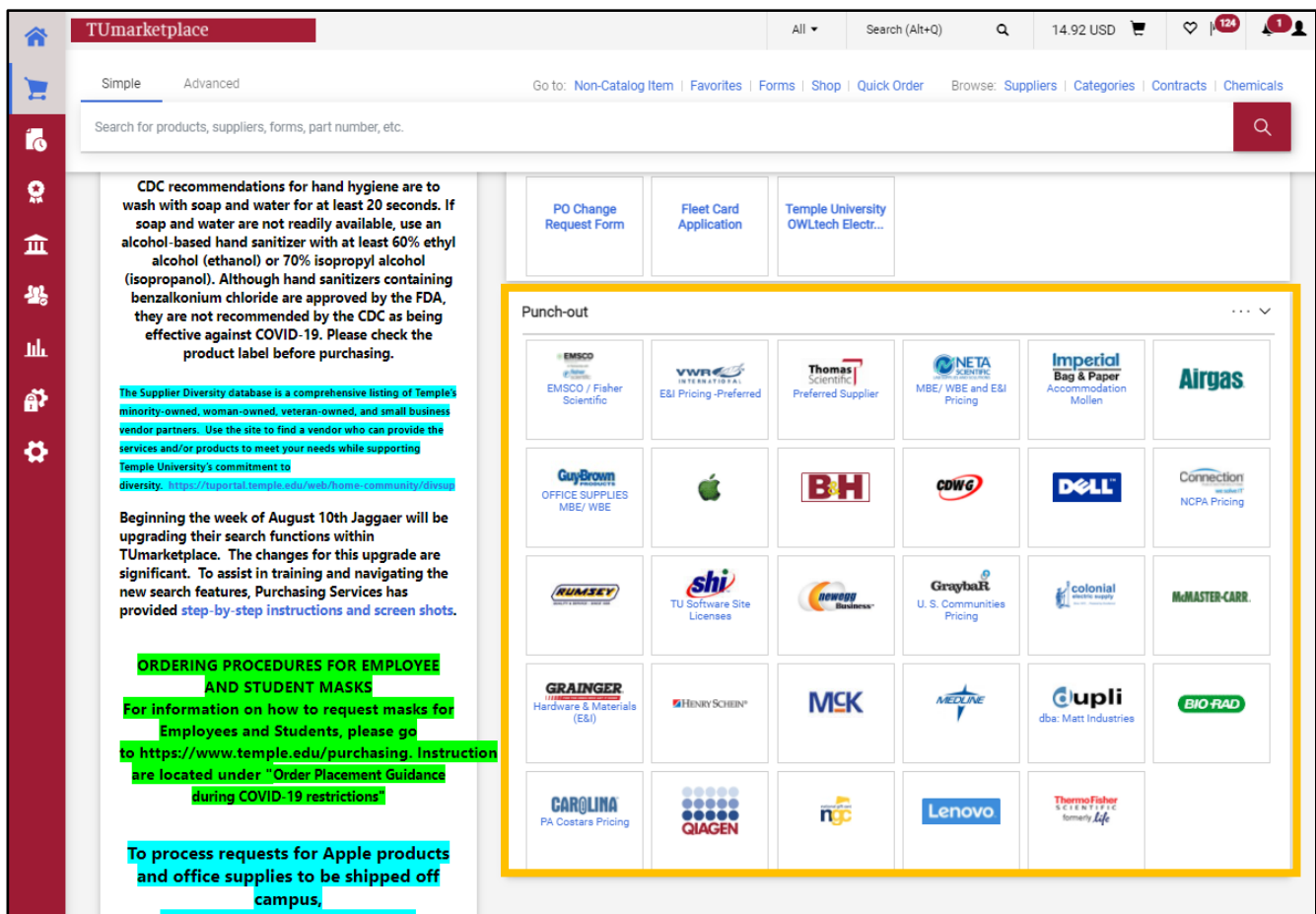
5. Once you are finished shopping, click on the cart icon in the upper right corner to proceed to checkout.

The image shows the TUmarketplace website with the shopping cart open. The cart is titled 'My Cart (Farrah's test order)' and contains two items: 'Dynalon PTFE Beaker Cover, 20 m...' with a quantity of 1 and a price of 7.46 USD. The total price is 14.92 USD. A yellow box highlights the 'Checkout' button. The top navigation bar shows the TUmarketplace logo, search bar, and a cart icon with a price of 14.92 USD.

Placing a Punch-Out Order

Purpose: In TUmarketplace, you will notice a selection of punch-out vendors with a link to their website. Punch-out vendors are those that host their own catalogs, but provide special pricing for Temple University users. Note: Clicking on a punch-out supplier will take you to that vendor’s website, but your order will still be finalized through TUmarketplace.

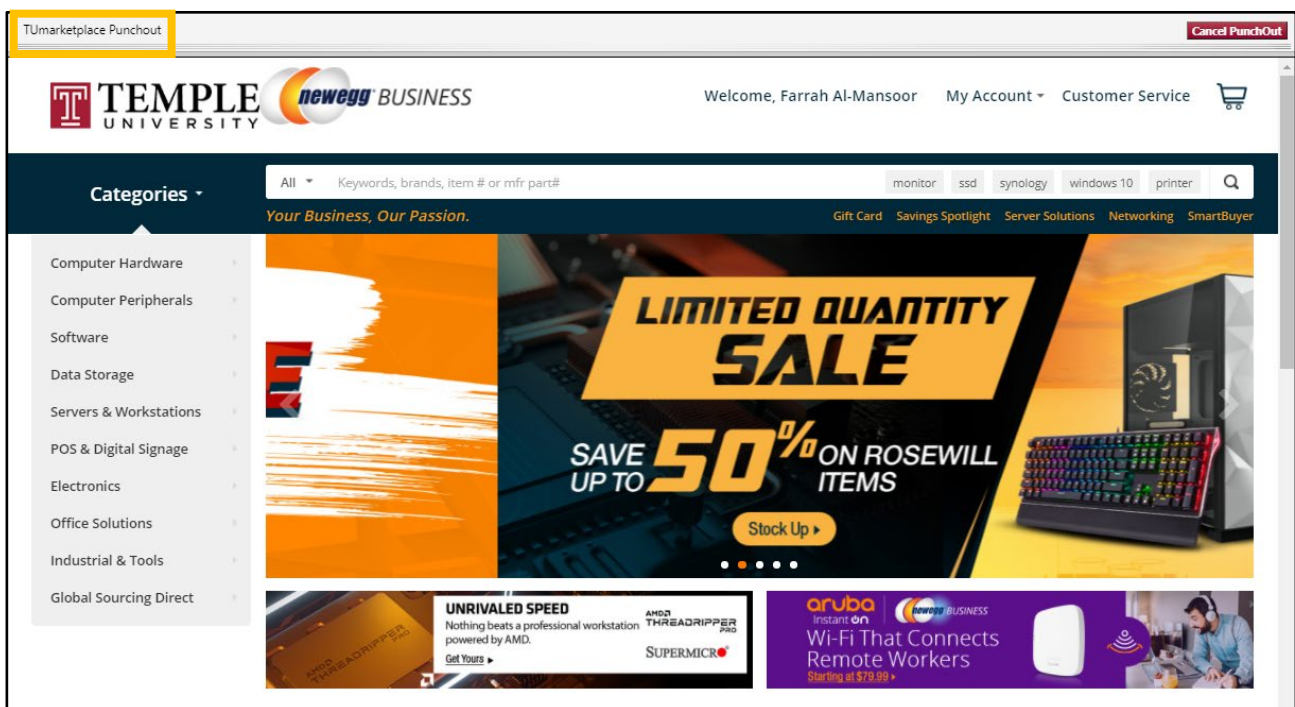
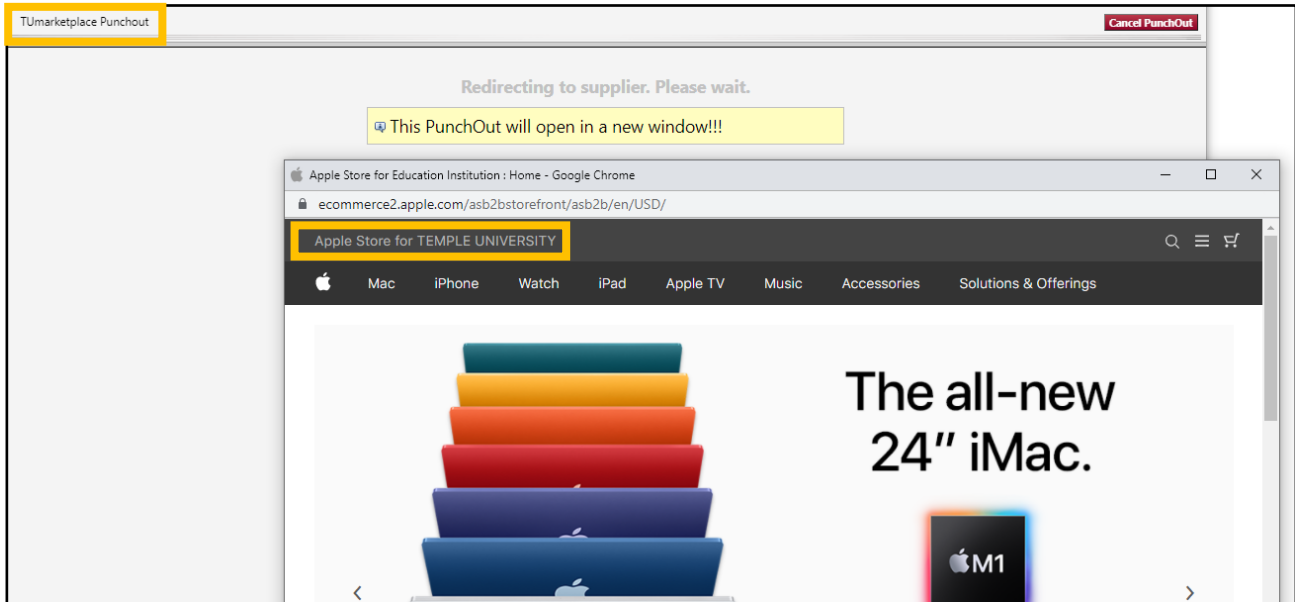
1. Log in to TUmarketplace.
2. Navigate to the lower section of the home/shop tab. You will see a selection of available punch-out vendors. Please note:
 - 2.1. If you see a vendor marked with a yellow triangle in a circle, that site is currently running slowly.
 - 2.2. If you see a vendor marked with a red “x” in a circle, that vendor is currently unavailable.



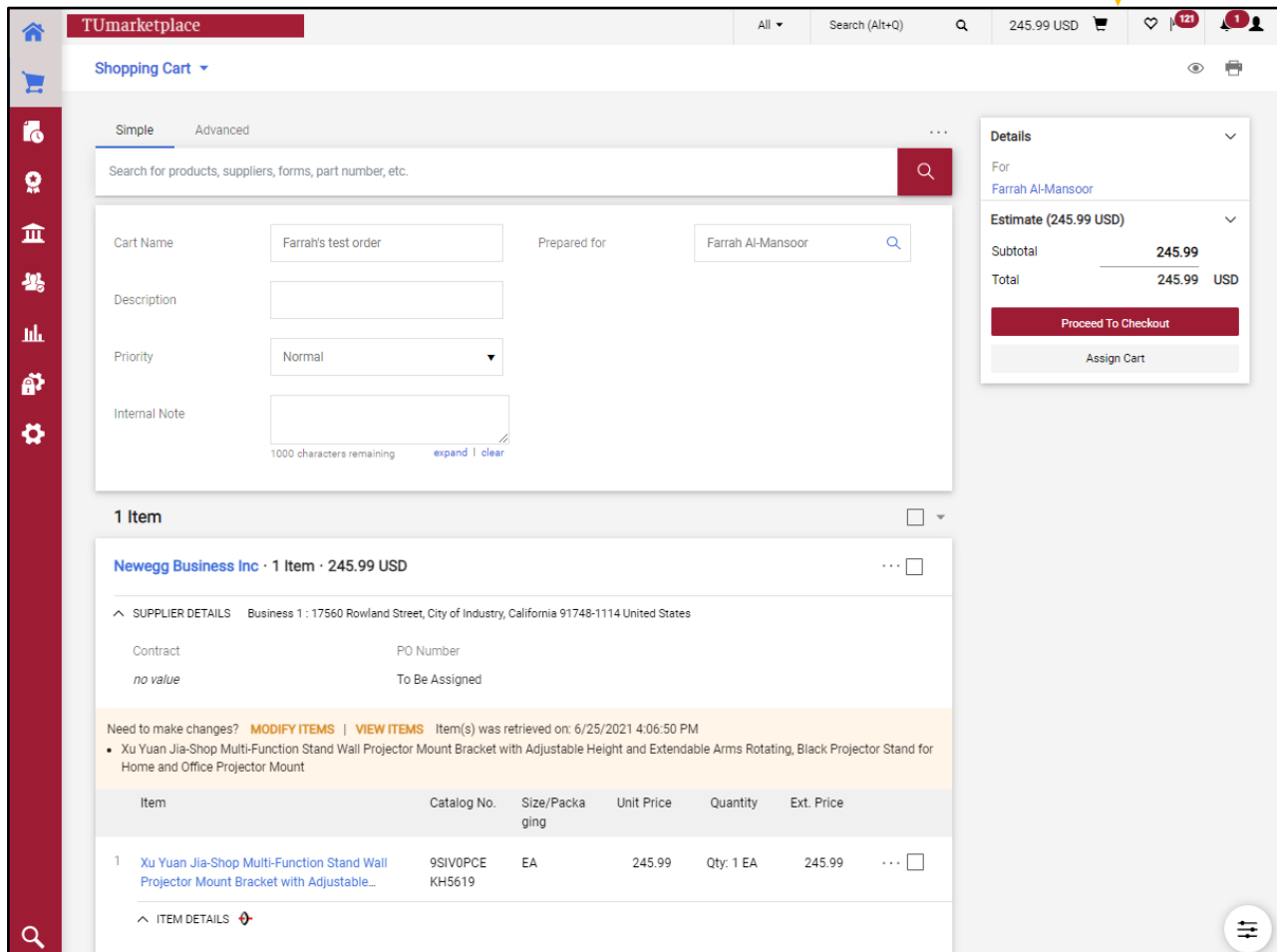
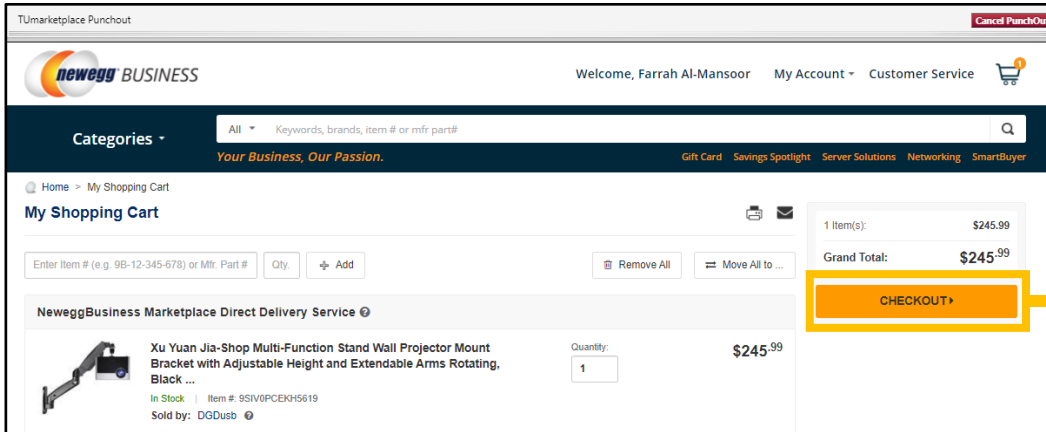
3. Click on a vendor and you will be redirected to the vendor's site, which may open in the same or a new window.

3.1. In some instances, you will see a prompt asking, "Do you want to view only the webpage content that was delivered securely?" It is important to respond "No" to this prompt; otherwise, you may not see all the information, including the discounted pricing, on the vendor's website.

3.2. Notice you are still part of the TUmarketplace site by the indicator in the upper left corner.



- Perform your search for your desired item on the vendor's site. From the vendor's page, you may see messages or other special features available for Temple users. Please note that each vendor's site is unique, so the functionality will vary but, in the end, you will always return to your cart in TUmarketplace to complete the requisitioning process.
- Once you have completed your shopping and added items to your cart, you can check out and you will be taken back to your TUmarketplace shopping cart, within the TUmarketplace site.



- Review your shopping cart in TUmarketplace and then finalize your order by clicking “Proceed To Checkout”. If you need to modify or view your items, click on the corresponding buttons above the item’s product description, and you will be taken back to the vendor’s punch-out site.

Priority: Normal

Internal Note: 1000 characters remaining expand | clear

1 Item

Newegg Business Inc · 1 Item · 245.99 USD

SUPPLIER DETAILS Business 1: 175 ... owland Street, City of Industry, California 91748-1114 United States

Contract: no value PO Number: To Be Assigned

Need to make changes? **MODIFY ITEMS** | **VIEW ITEMS** Item (s) was retrieved on: 6/25/2021 4:06:50 PM

- Xu Yuan Jia-Shop Multi-Function Stand Wall Projector Mount Bracket with Adjustable Height and Extendable Arms Rotating, Black Projector Stand for Home and Office Projector Mount

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1 Xu Yuan Jia-Shop Multi-Function Stand Wall Projector Mount Bracket with Adjustable...	9SIV0PCE KH5619	EA	245.99	Qty: 1 EA	245.99

Details

For Farrah Al-Mansoor

Estimate (245.99 USD)

Subtotal: 245.99

Total: 245.99 USD

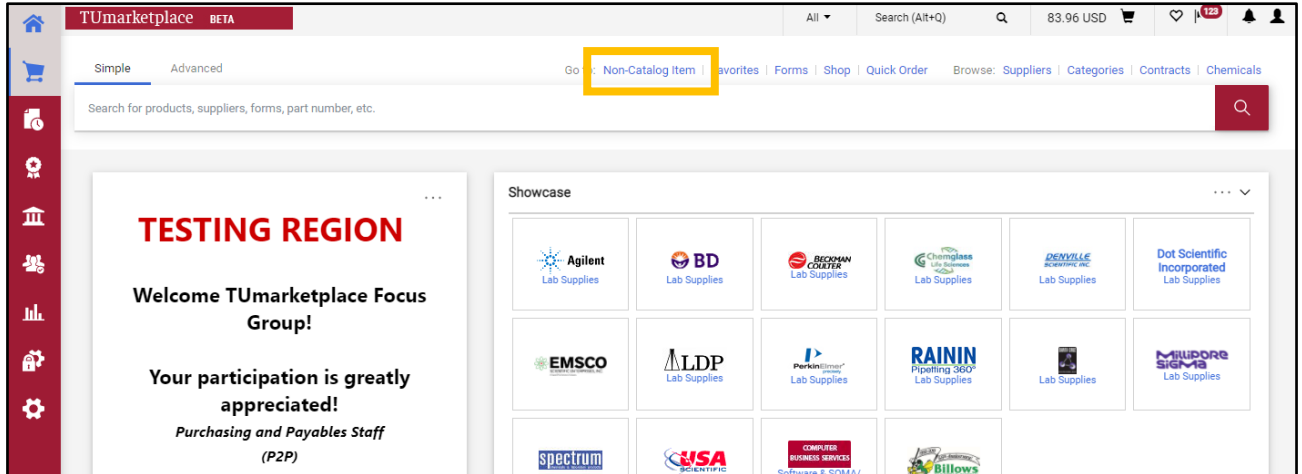
Proceed To Checkout

Assign Cart

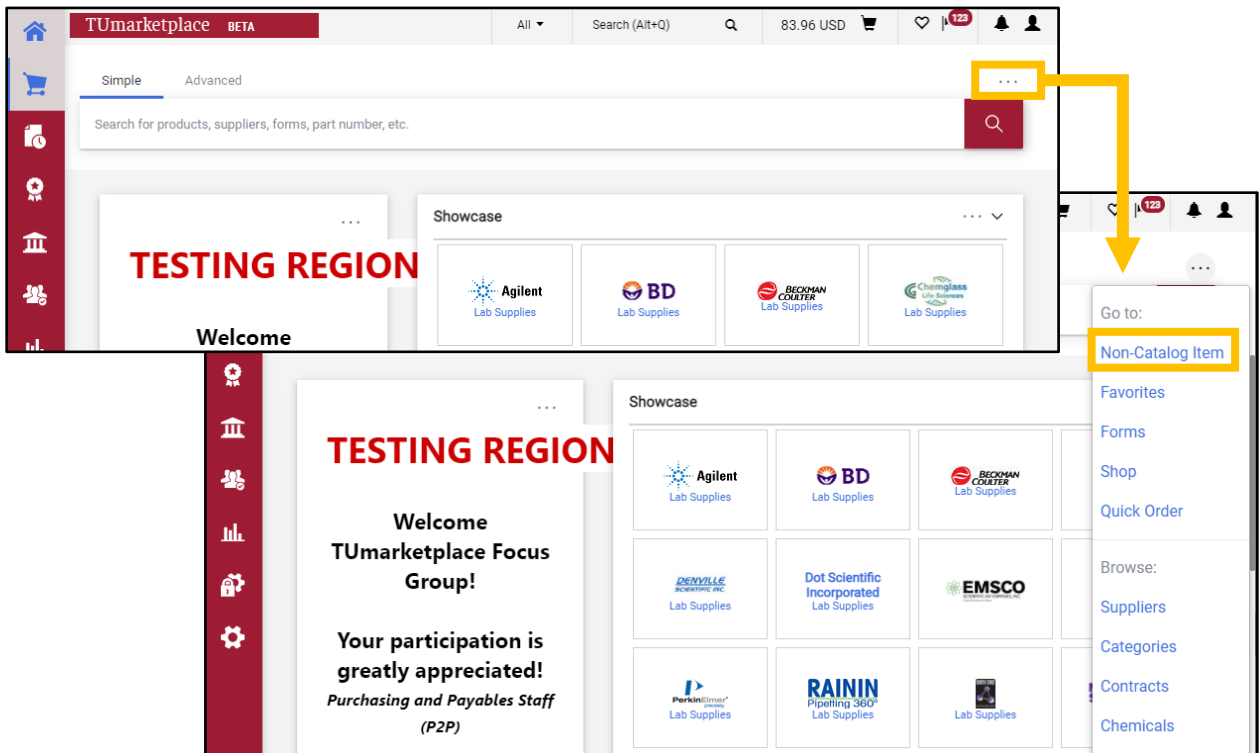
Placing a Non-Catalog Order

Purpose: This document will guide you through the steps of placing a non-catalog order in TUmarketplace. A non-catalog requisition is utilized when the item(s) or service(s) is not found through searching TUmarketplace catalogs.

1. Log in to TUmarketplace.
2. Click the “Non-Catalog Item” link.
 - a. If your window is wide enough, this will appear above the search bar.



- b. If your window is too small, you must click the three dots above the search bar, and then click the “Forms” link.



3. Once the link is selected, a pop-up window will appear where you will enter your product or service information. The following areas are required for you to place your order.

3.1. Supplier:

- 3.1.1. Type the supplier’s name to find the appropriate supplier.
- 3.1.2. If the supplier is not in TUmarketplace, you may enter the information by clicking the “Manual Supplier” link.
- 3.1.3. If you do not know a supplier that can provide the product, you can also select “Supplier Not Known”.

3.2. **Product Description:** Describe the product or service you are requesting.

3.3. **Catalog No.:** This is only necessary if you know that the product is categorized by its catalog number.

3.4. Quantity:

- 3.4.1. If you are ordering a product, enter the quantity here.
- 3.4.2. If you are ordering a service, the quantity should always be 1.

3.5. **Price:** Enter the price here (per item if you are ordering multiple products).

3.6. **Packaging:** Enter the unit of measure (UOM) (per item if you are ordering multiple products).

3.7. **Commodity code:** This describes the type of product or service. To find the appropriate code, click the magnifying glass and scroll through the list of commodities to find the appropriate one. You can narrow the list by entering a search term in the “Description contains...” field and clicking “Filter”. Click the plus icon to enter the code.

3.8. **Add Internal Attachments:** This button will allow you to add an attachment to the order.

- Click "Save" to add this item to your cart. Your order will appear as follows once it is in your cart. Click "Proceed to Checkout" to submit your order.

The screenshot displays the TUmarketplace Shopping Cart interface. At the top, the page title is 'TUmarketplace' and the cart total is '50.00 USD'. The main area is divided into several sections:

- Search Bar:** A search bar at the top left with the placeholder text 'Search for products, suppliers, forms, part number, etc.' and a magnifying glass icon.
- Form Fields:** A section for editing the cart details, including:
 - Cart Name:** A text input field containing 'Farrah's test order'.
 - Description:** An empty text input field.
 - Priority:** A dropdown menu set to 'Normal'.
 - Internal Note:** A large text area with a '1000 characters remaining' warning and 'expand | clear' links.
 - Prepared for:** A text input field containing 'Farrah Al-Mansoor' with a search icon.
- 5 Items:** A section showing the cart's contents:
 - Supplier:** Beckman Coulter Incorporated - 5 Items - 50.00 USD.
 - Supplier Details:** Business 1: 250 South Kraemer Boulevard, Brea, CA.
 - Contract:** no value. PO Number: To Be Assigned.
 - Item Table:**

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1 Alpha Order	12345	20oz 1/BX	10.00	5 BX	50.00
 - Item Details:**
 - Contract:** Internal Note field with '1000 characters remaining' warning.
 - Taxable:** A checkbox that is currently unchecked.
 - Commodity Code:** A text input field containing '25101503' with a search icon and the label 'Automobiles' below it.
 - External Note:** A large text area with a '1000 characters remaining' warning and 'expand | clear' links.
- Summary Panel:** A panel on the right side showing:
 - Details:** For Farrah Al-Mansoor.
 - Estimate (50.00 USD):**
 - Subtotal: 50.00
 - Total: 50.00 USD
 - Buttons:** A prominent red 'Proceed To Checkout' button (highlighted with a yellow box) and a smaller 'Assign Cart' button below it.

Purchasing Computer Software in TUmarketplace

Purpose: When you need to purchase computer software through TUmarketplace, there are a few different ways to process your request. This guide will demonstrate the steps to purchase software.

Pre-Approval for Software Purchases:

Software purchases may require pre-approval from a variety of areas depending on the nature of the product:

- **Accessibility:** Software that will be used by more than one person will require review and approval by the Accessibility office
- **Information Technology Services:** Software that will be hosted or that will require assistance from ITS requires their review and approval
- **IT Security:** **All software** requires a data security review by IT Security

To obtain pre-approval, you must complete the pre-approval request form, located on TUportal, on the Staff Tools tab, in the University Forms section (search for “purchasing pre-approval”). For more information regarding pre-approvals, refer to the Purchasing Services section of TUportal, located on the Budget and Finance tab in the Buying and Paying section. Click on “Procedures”, then on “Purchasing Pre-Approval Requests”.

Note that pre-approval must be obtained **before** the software is purchased. This rule applies to renewals as well.

Methods of Purchasing Software:

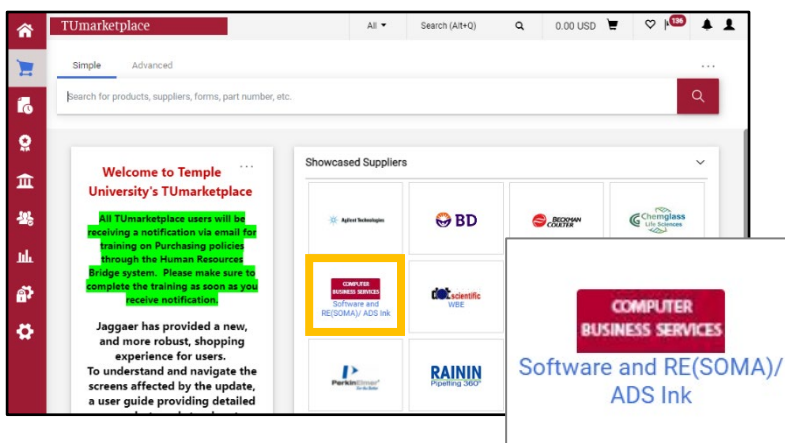
There are four different ways to purchase software in TUmarketplace – each is discussed below.

1. Computer Business Services (CBS) Showcase Supplier Catalog

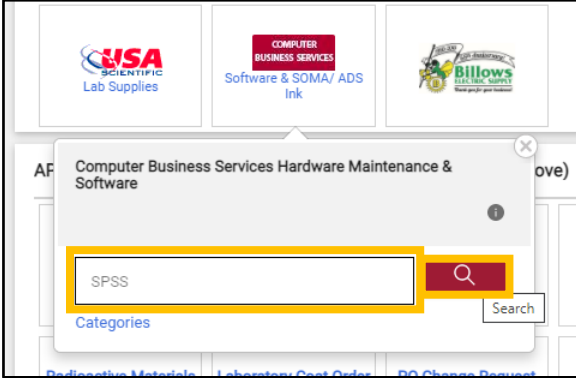
SAS and SPSS licenses must be purchased through the Showcase Supplier Catalog.

1.1. Log in to TUmarketplace.

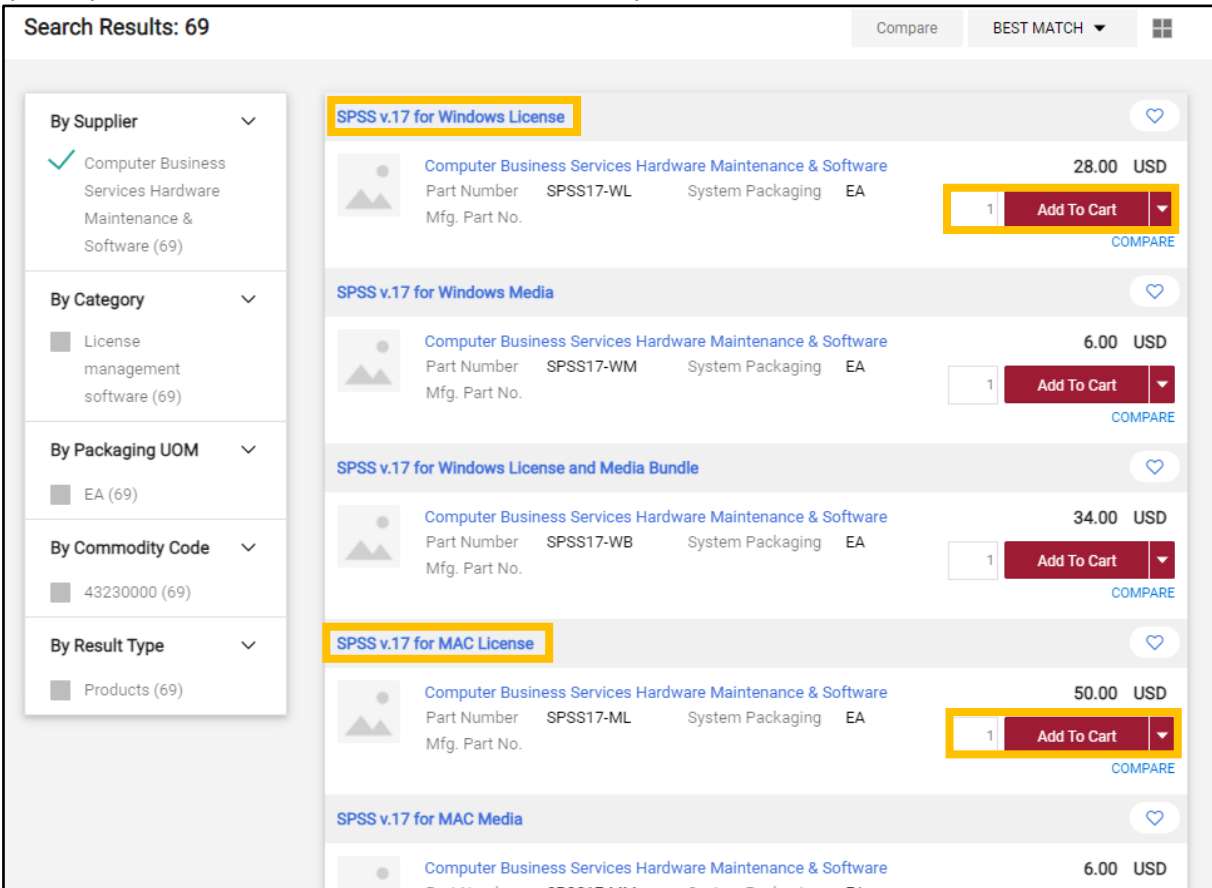
1.2. Click on the CBS catalog.



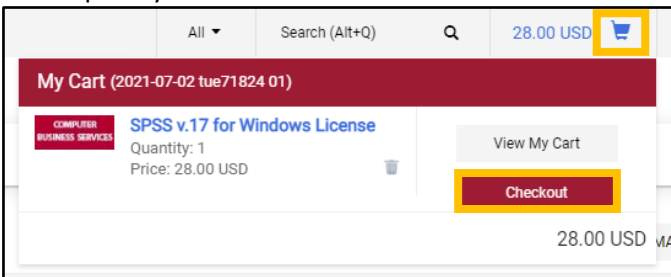
1.3. Type “SAS” or “SPSS” into the search field that appears, then click on the magnifying glass.



1.4. From the search results, choose a “License” option (not “Media” or “License and Media”), enter the desired quantity, and click “Add to Cart”. Note: The License option will not include an installation disc.



1.5. The selected item will appear in your TUmarketplace account. Click the cart icon and then click “Checkout” to complete your order.

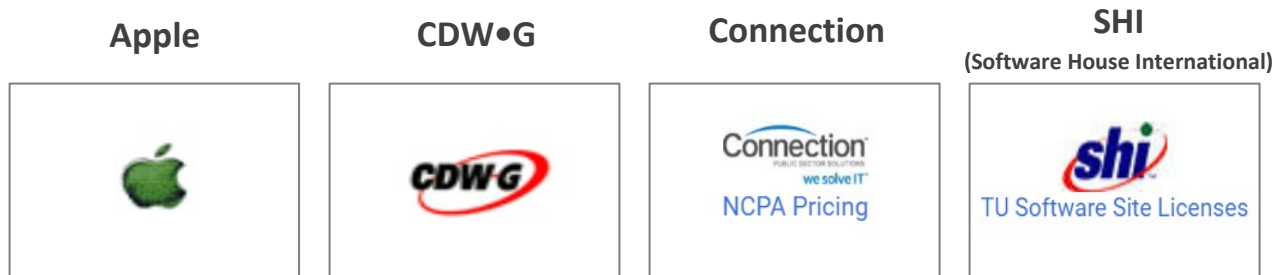


Additional requirements for SAS and SPSS purchases:

- A signed Software Site License Agreement must be completed in order for your request to be fulfilled. Agreements can be found in TUportal by clicking on the Staff Tools tab, scrolling down to the University Forms section, and searching for “License”. Be sure to attach your assigned agreement as an internal attachment to your requisition.
- Order fulfillment: Purchasing Services will email a confirmation letter to the contact person listed on the requisition. The email will include a SID (.txt) file for SAS and/or an installation key for SPSS. It will also contain a copy of your Software Site License Agreement.

2. Punch-out Suppliers

Software is also available in TUmarketplace through the following suppliers:



Software orders totaling **\$5,000 or less** that are submitted through a TUmarketplace Punch-out will be sent directly to the supplier for processing.

Orders that are **greater than \$5,000** will be forwarded to Temple’s Purchasing Services for review prior to processing to determine whether there is a bidding opportunity for the product(s).

3. Non-Catalog Items

If you have a question with regard to your request, contact Purchasing Services or enter the request as a Non-Catalog Item. When entering Non-Catalog requests, be sure to add supporting documentation, including part numbers and any pricing that you received.

4. Contract Approval Request Form

Software purchases that require a signature on an agreement will need to be submitted through the Contract Approval Request form in TUmarketplace for review by University Counsel and signature by the CFO’s office. *Only representatives from the CFO’s office are authorized to sign on behalf of Temple University.*

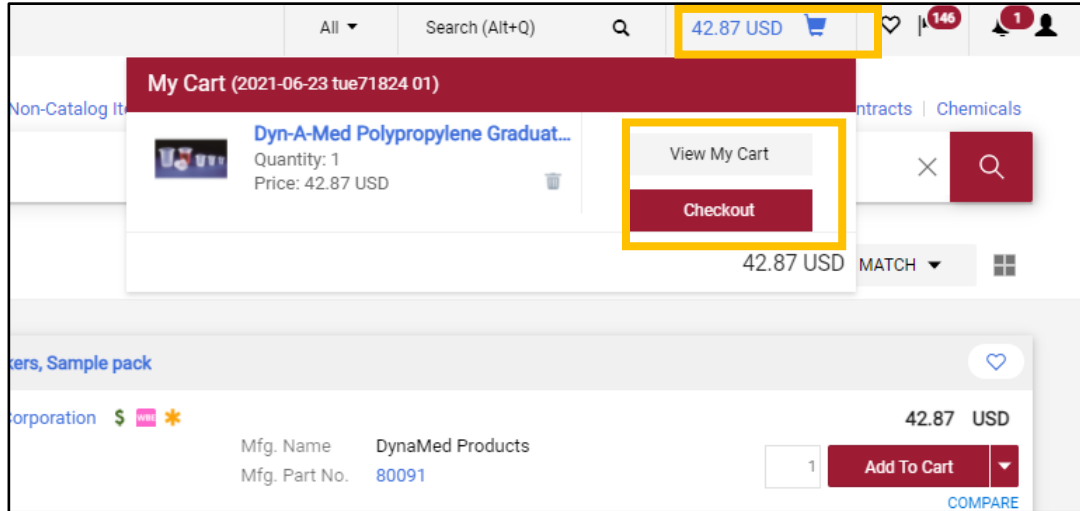
Adding Attachments to Requisitions

Purpose: This document will guide you through the steps of adding and moving attachments to your requisitions.

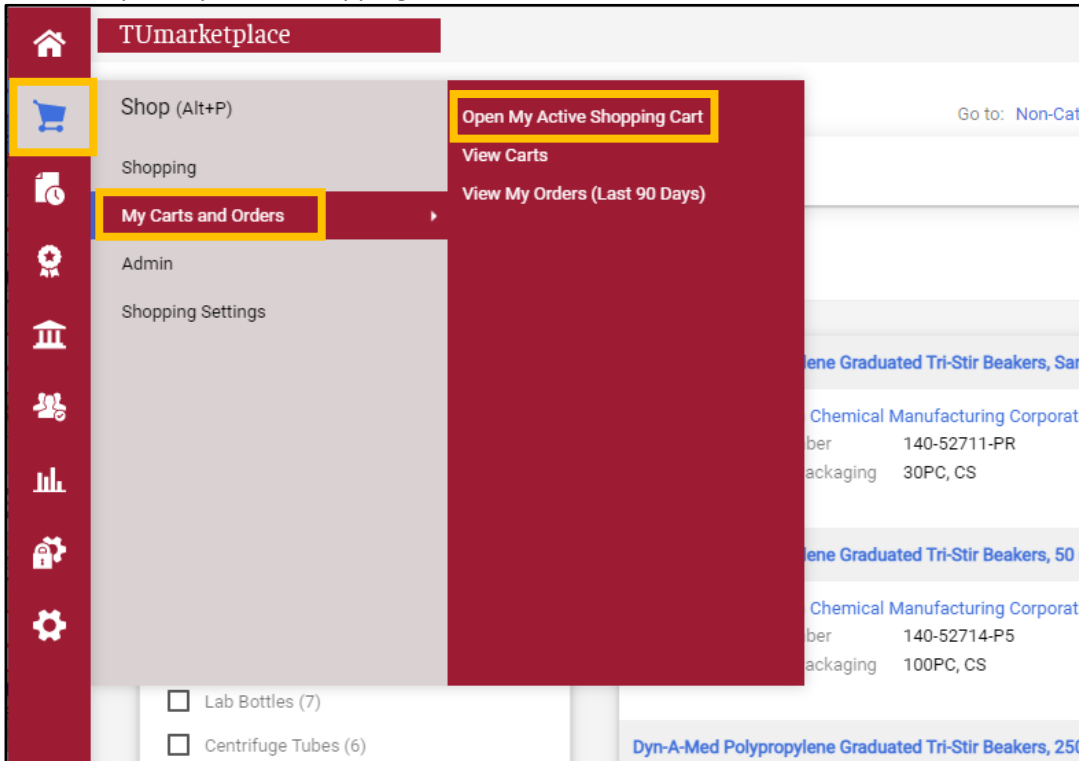
1. To add an attachment before placing the order:

1.1. Navigate to your cart in one of two ways:

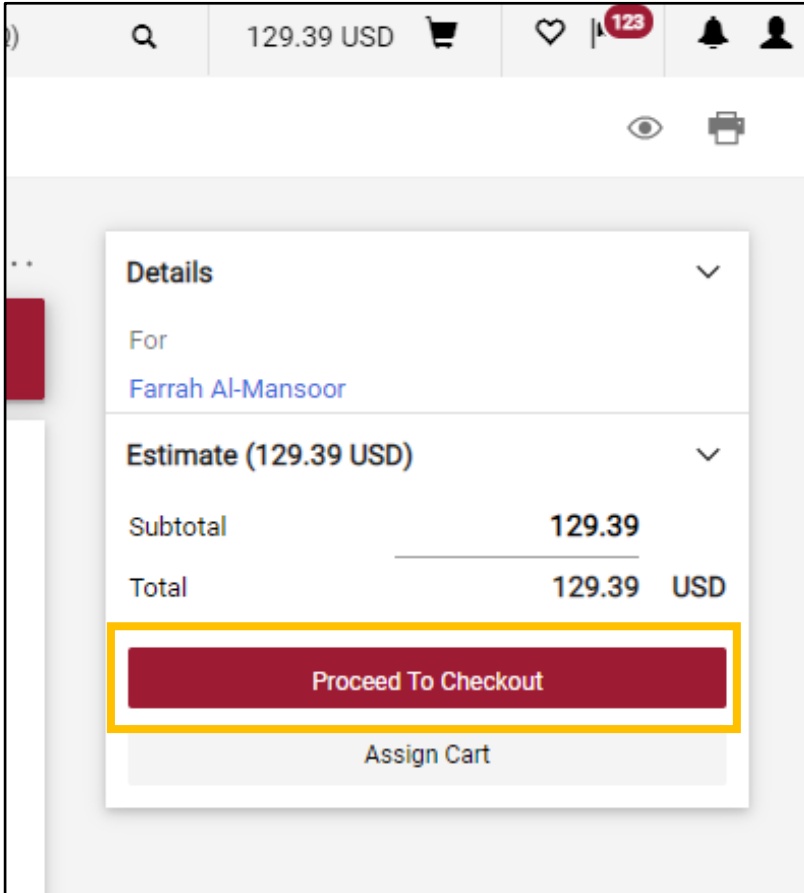
1.1.1. Click on the cart icon at the top right of the page and click “View My Cart” or “Checkout”.



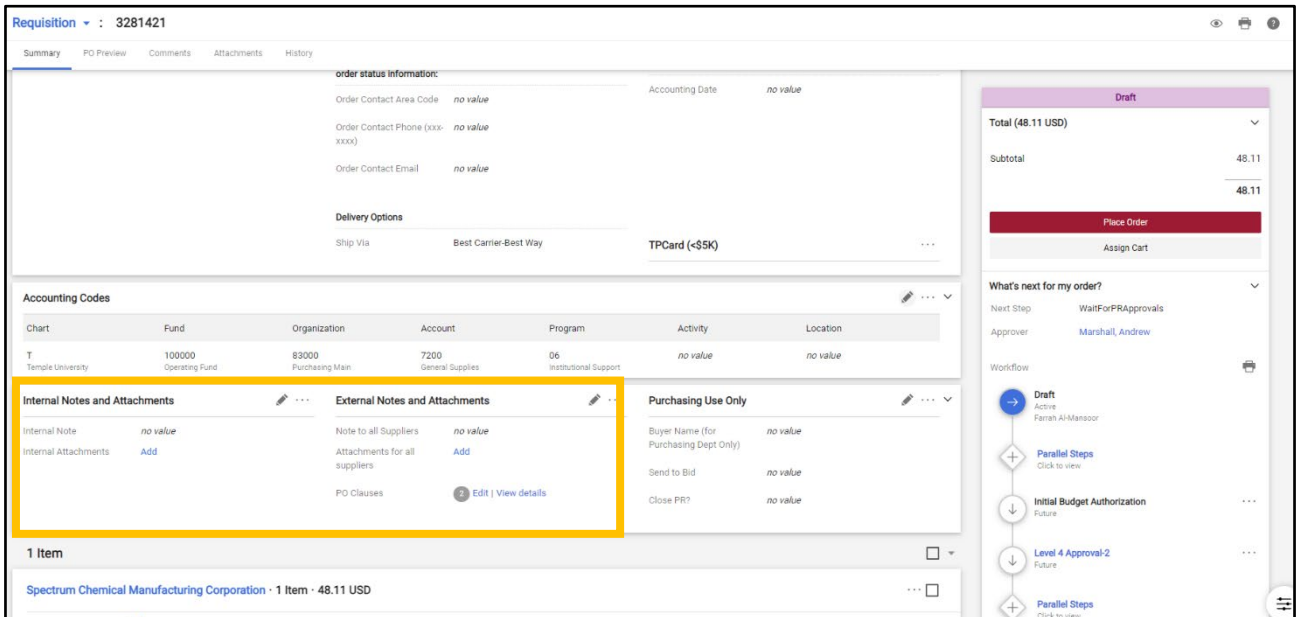
1.1.2. Hover over the cart icon at the left side of the screen, hover over “My Carts and Orders”, and click on “Open My Active Shopping Cart”.



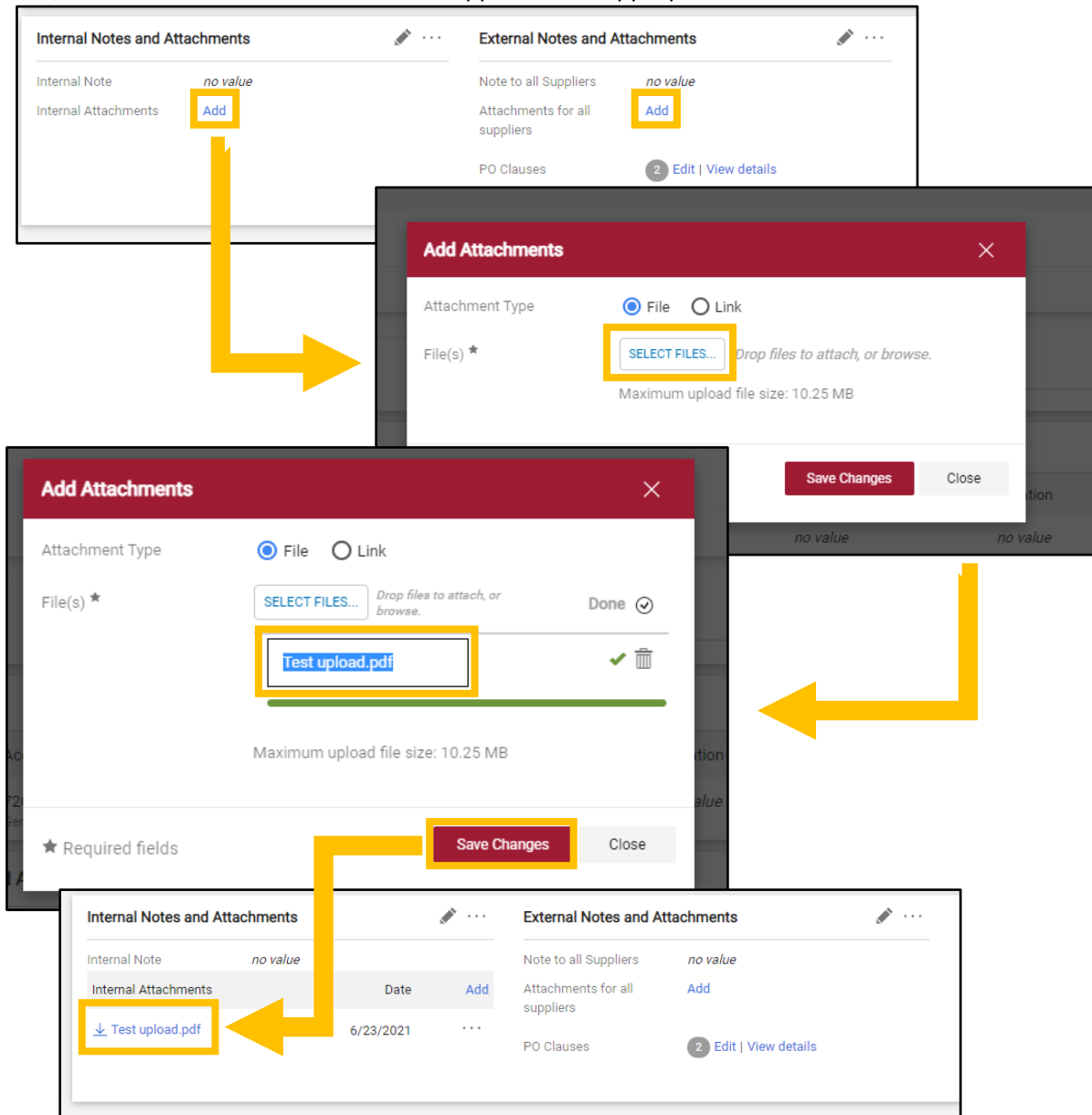
1.2. From your shopping cart, click “Proceed To Checkout”.



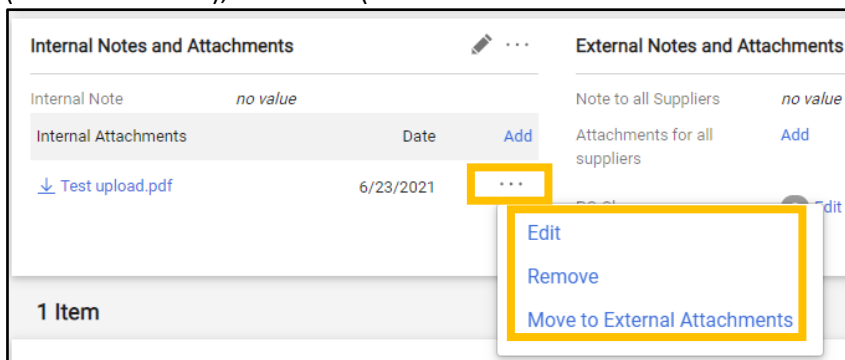
1.3. You will be taken to the draft requisition, where you can add internal and external notes and attachments. Internal notes and attachments are viewable by Temple administration only; external notes and attachments which will go to the vendor with the purchase order.



1.4. Click the “Add” link under the appropriate section (internal or external), upload the file, rename it if you wish, and click save. The attachment will appear in the appropriate section.



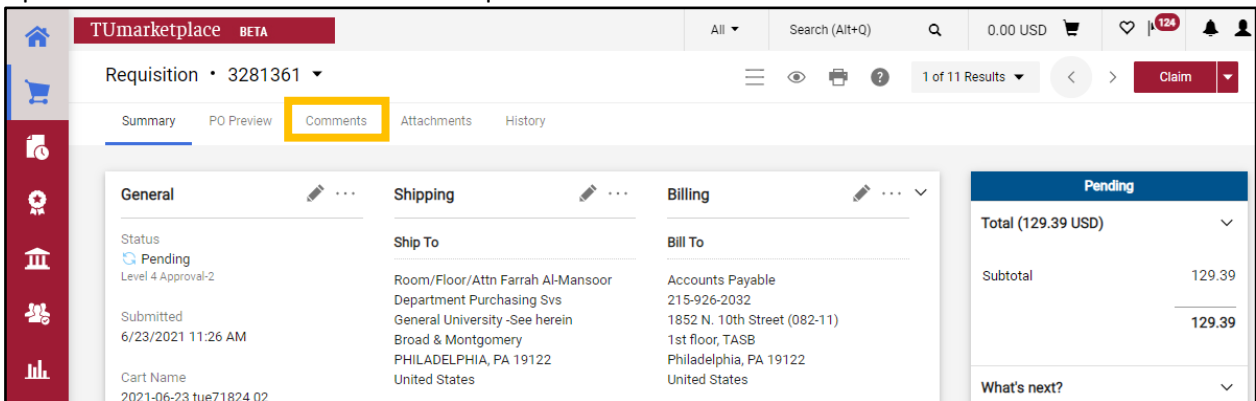
1.5. Clicking on the three dots next to the attachment gives you three options: edit (to rename the file), remove (to delete the file), and move (from the internal to the external section and vice versa).



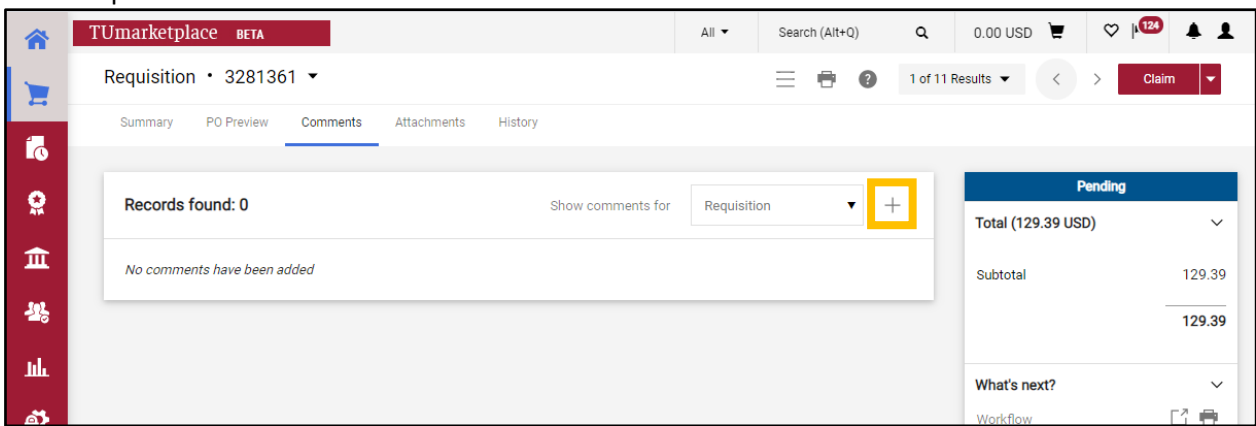
2. To add an attachment after submitting the requisition:

2.1. Navigate to the requisition (see [Quick Search for a Requisition, Receipt, or Purchase Order](#)).

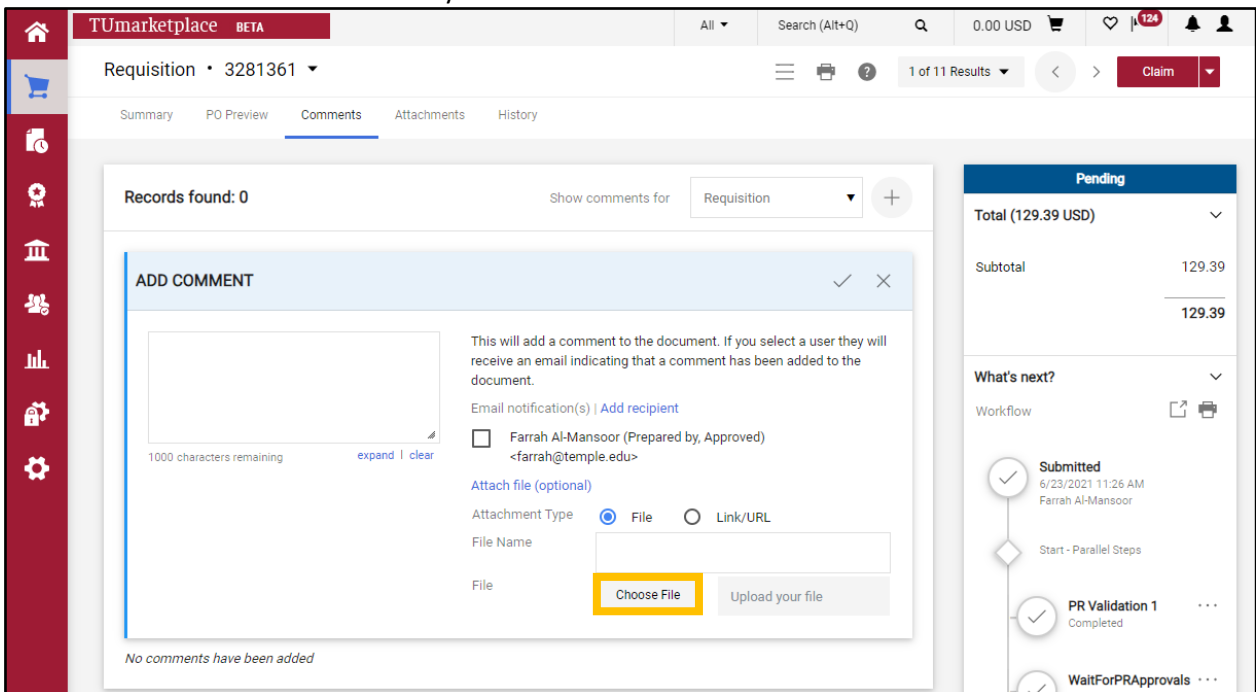
2.2. Open the “Comments” section of the requisition.



2.3. Click the plus icon to add a comment.



2.4. Click “Choose File” to select and add your attachment.



2.5. If you wish, rename the file in the “File Name” section and/or add a comment in the comment area.

ADD COMMENT ✓ ✕

Adding test attachment to this requisition per your request.

940 characters remaining expand | clear

This will add a comment to the document. If you select a user they will receive an email indicating that a comment has been added to the document.

Email notification(s) | [Add recipient](#)

Farrah Al-Mansoor (Prepared by, Approved) <farrah@temple.edu>

[Attach file \(optional\)](#)

Attachment Type File Link/URL

File Name: Test attachment

File: Choose File | Test upload.pdf

2.6. If you'd like the system to notify someone via email of the attachment, select them from the list, or click “Add Recipient” to find them.

ADD COMMENT ✓ ✕

Adding test attachment to this requisition per your request.

940 characters remaining expand | clear

This will add a comment to the document. If you select a user they will receive an email indicating that a comment has been added to the document.

Email notification(s) | [Add recipient](#)

Farrah Al-Mansoor (Prepared by, Approved) <farrah@temple.edu>

Greenberg, Naomi <naomi.greenberg@temple.edu>

[Attach file \(optional\)](#)

Attachment Type File Link/URL

File Name: Test attachment

File: Choose File | Test upload.pdf

2.7. Click the check mark to submit your attachment.

ADD COMMENT ✓ ✕

Adding test attachment to this requisition per your request.

940 characters remaining [expand](#) | [clear](#)

This will add a comment to the document. If you select a user they will receive an email indicating that a comment has been added to the document.

Email notification(s) | [Add recipient](#)

Farrah Al-Mansoor (Prepared by, Approved) <farrah@temple.edu>

Greenberg, Naomi <naomi.greenberg@temple.edu>

Attach file (optional)

Attachment Type File Link/URL

File Name

File

2.8. The comment and attachment will be added to the requisition.

TUmarketplace BETA

All Search (Alt+Q) 0.00 USD 124

Requisition • 3281361 1 of 11 Results Claim

Summary PO Preview **Comments** **Attachments** History

Records found: 1 Show comments for Requisition +

Farrah Al-Mansoor - 6/30/2021 12:17:42 PM Requisition - 3281361 Comment Added ↻

Adding test attachment to this requisition per your request.

Email sent: Naomi Greenberg <naomi.greenberg@temple.edu>

Attachment Added: [Test attachment](#)

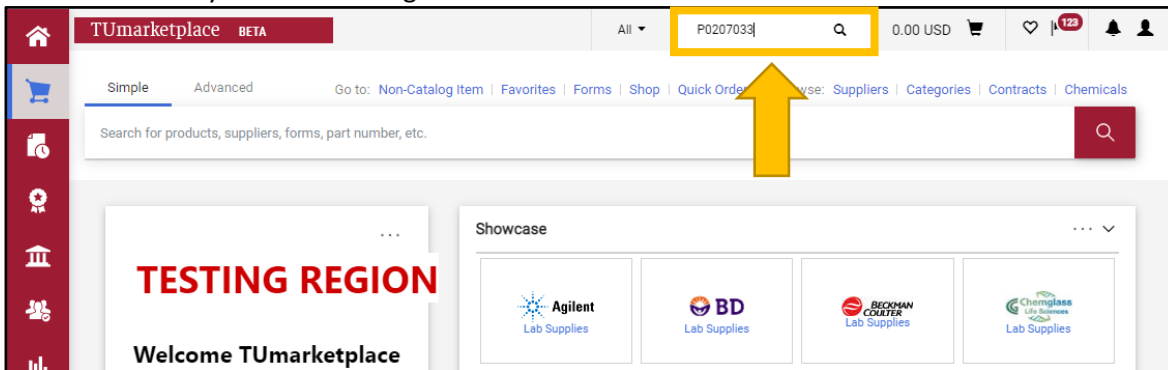
Pending	
Total (129.39 USD)	
Subtotal	129.39
	129.39

What's next? Workflow

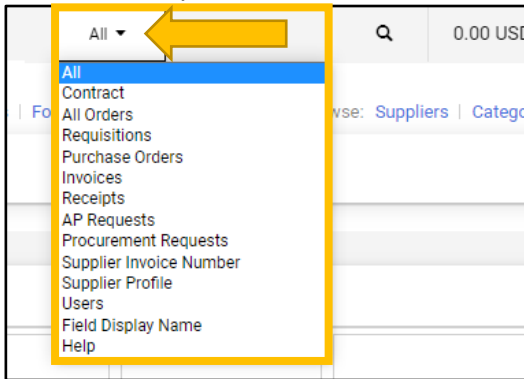
Using Quick Search to Find a Requisition, Receipt, or Purchase Order

Purpose: When you need to quickly find a particular document in TUmarketplace – such as a requisition number, purchase order number, or receipt number – you may use the Quick Search function. This guide will demonstrate the steps to perform a Quick Search in TUmarketplace.

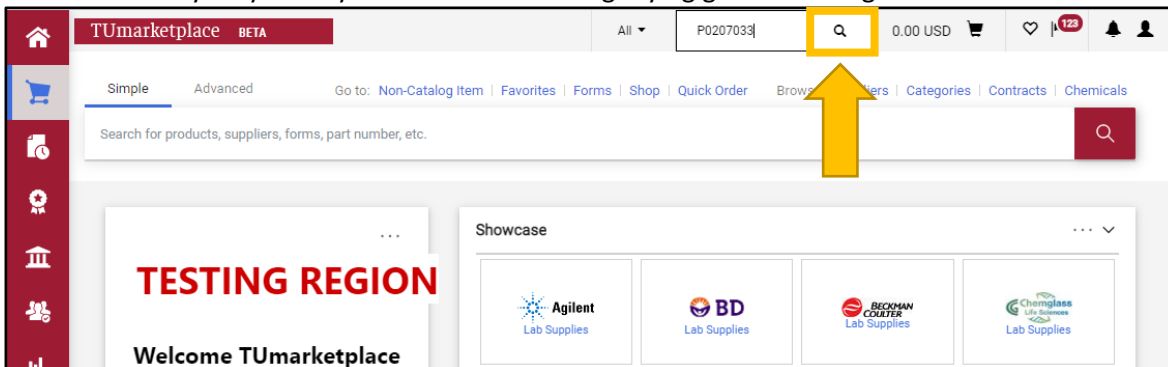
1. Log in to TUmarketplace.
2. Enter the relevant information in the search field at the top of the page. You will need to know at least part of the number that you are searching.



3. To filter your search results by common criteria, click the dropdown menu to the left of the search field and select the one you want.



4. Hit the Enter key on your keyboard or click the magnifying glass to the right of the search field.



- If multiple options match your search, a list of them will appear; select the one you wish to view by clicking on it. Otherwise, if there is only one possible match, you will be taken directly to the appropriate page. Note that if you do not select a specific document type, related documents will appear among the search results.

The screenshot displays the TUmarketplace interface. At the top left, a search bar contains 'P0207033'. Below it, a sidebar lists search results under categories: Requisitions (1275416), Purchase Orders (P0207033, highlighted with a yellow box), Invoices (227412), and Receipts (105743, 105742). A yellow arrow points from the highlighted 'P0207033' to the main document view.

The main document view for 'P0207033 Revision 0' includes the following information:

- Supplier:** TU Portal Test 3
- Available Actions:** Add Comment, Go
- Document Status:** A/P status: Open; Workflow: Completed (1/15/2015 9:16 AM); Distribution: Manual; Distribution Date/Time: 1/15/2015 9:16 AM; Supplier: Sent To Supplier.
- Line Item Status Table:**

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	Receiving	Invoicing	Matching
1 ✓ Test 3 more info...		TEST 1/EA	300.00	500 EA Add discount...	150,000.00 USD	Fully Received	Fully Invoiced	Fully Matched
2 ✓ Testing invoicing 4 more info...		1/EA	20.50	32 EA Add discount...	656.00 USD	Fully Received	Fully Invoiced	Fully Matched
3 ✓ testing invoicing more info...		2/EA	12.95	24 EA Add discount...	310.80 USD	Fully Received	Fully Invoiced	Fully Matched

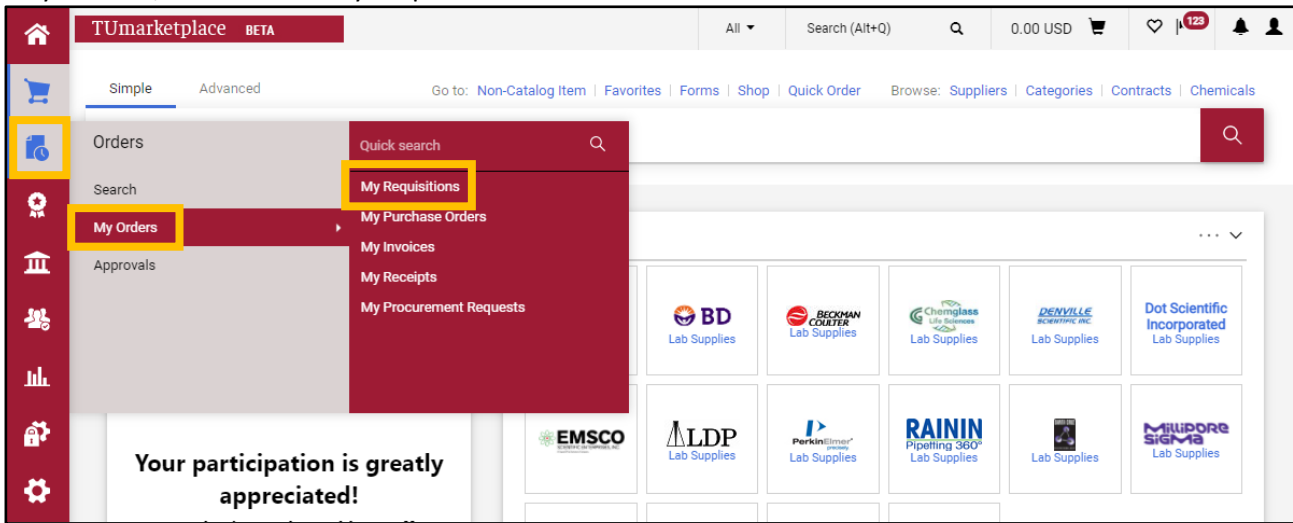
Total: 150,966.80 USD

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

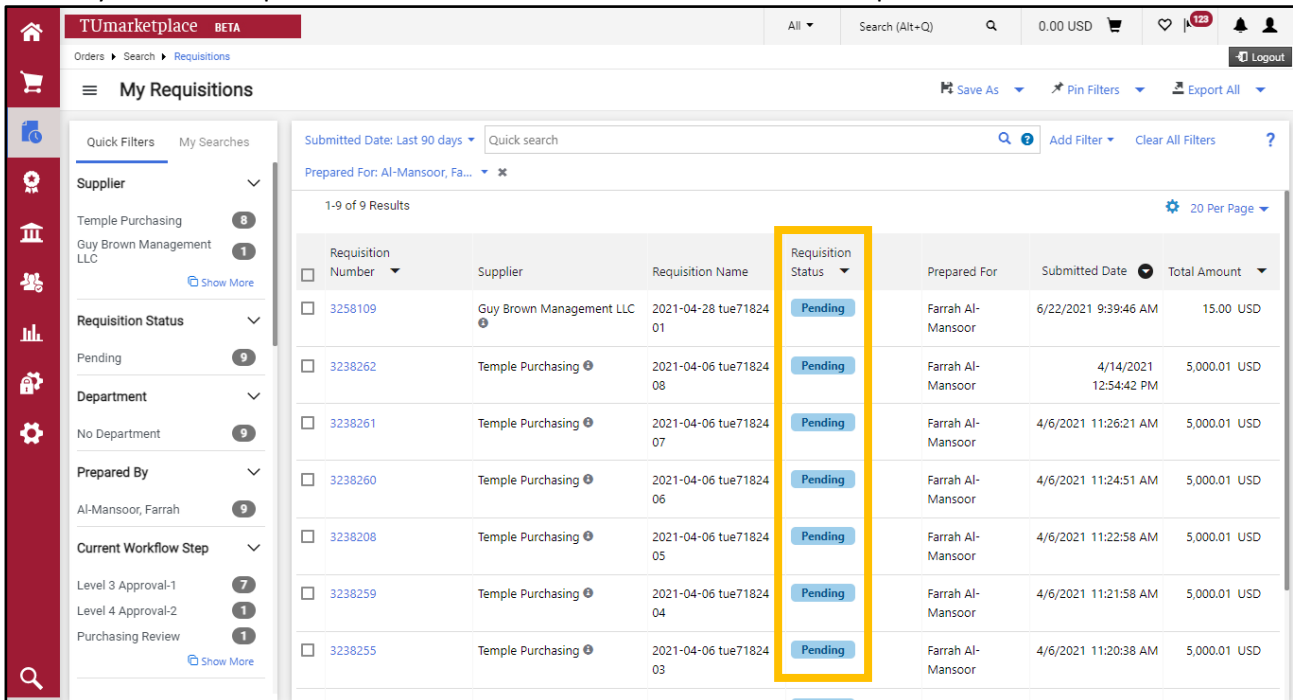
Viewing the Status of Your Submitted Requisitions

Purpose: This document explains how users can view the status of their submitted requisitions in TUmarketplace.

1. Log in to TUmarketplace.
2. Navigate to your submitted requisitions: Hover over the Orders icon on the left side of the screen, hover over “My Orders”, and click on “My Requisitions”.



3. Review your list of requisitions. The current status is indicated in the “Requisition Status” column.



4. Open a requisition by clicking on the requisition in the “Requisition Number” column.

Submitted Date: Last 90 days | Quick search

Prepared For: Al-Mansoor, Fa...

1-9 of 9 Results | 20 Per Page

Requisition Number	Supplier	Requisition Name	Requisition Status	Prepared For	Submitted Date	Total Amount
3258109	Guy Brown Management LLC	2021-04-28 tue71824 01	Pending	Farrah Al-Mansoor	6/22/2021 9:39:46 AM	15.00 USD
3238262	Temple Purchasing	2021-04-06 tue71824 08	Pending	Farrah Al-Mansoor	4/14/2021 12:54:42 PM	5,000.01 USD
3238261	Temple Purchasing	2021-04-06 tue71824 07	Pending	Farrah Al-Mansoor	4/6/2021 11:26:21 AM	5,000.01 USD
3238260	Temple Purchasing	2021-04-06 tue71824 06	Pending	Farrah Al-Mansoor	4/6/2021 11:24:51 AM	5,000.01 USD
3238208	Temple Purchasing	2021-04-06 tue71824 05	Pending	Farrah Al-Mansoor	4/6/2021 11:22:58 AM	5,000.01 USD
3238259	Temple Purchasing	2021-04-06 tue71824 04	Pending	Farrah Al-Mansoor	4/6/2021 11:21:58 AM	5,000.01 USD
3238255	Temple Purchasing	2021-04-06 tue71824 03	Pending	Farrah Al-Mansoor	4/6/2021 11:20:38 AM	5,000.01 USD

5. On the requisition page, the requisition’s status and step in its workflow will show in the box to the right. The current step is indicated with an arrow in a blue circle.

Requisition : 3258109

Summary | PO Preview | Comments | Attachments | History

General

Status: Pending (Level 4 Approval-2)

Submitted: 6/22/2021 9:39 AM

Cart Name: 2021-04-28 tue71824 01

Description: no value

Priority: Normal

Prepared by: Farrah Al-Mansoor

Shipping

Ship To: Room/Floor/Attn Farrah Al-Mansoor, Department Purchasing Svs, General University -See herein, Broad & Montgomery PHILADELPHIA, PA 19122, United States

Billing

Bill To: Accounts Payable, 215-926-2032, 1852 N. 10th Street (082-11) 1st floor, T45B, Philadelphia, PA 19122, United States

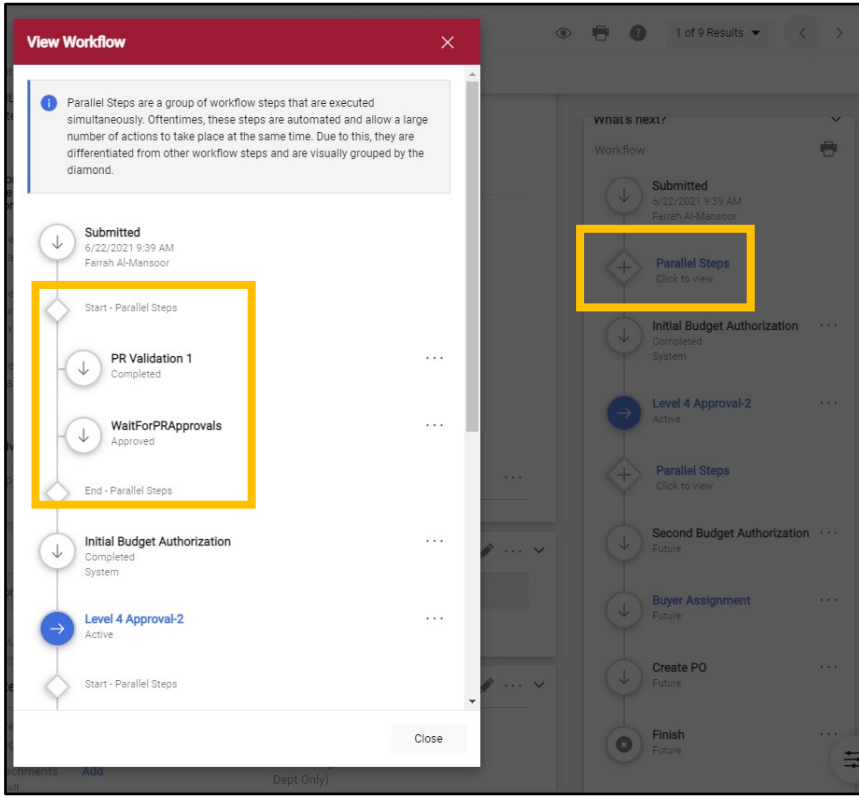
Accounting Codes

Chart	Fund	Organization	Account	Program	Activity	Location
T	100000	83000	7200	06	no value	no value
Temple University	Operating Fund	Purchasing Main	General Supplies	Institutional Support		

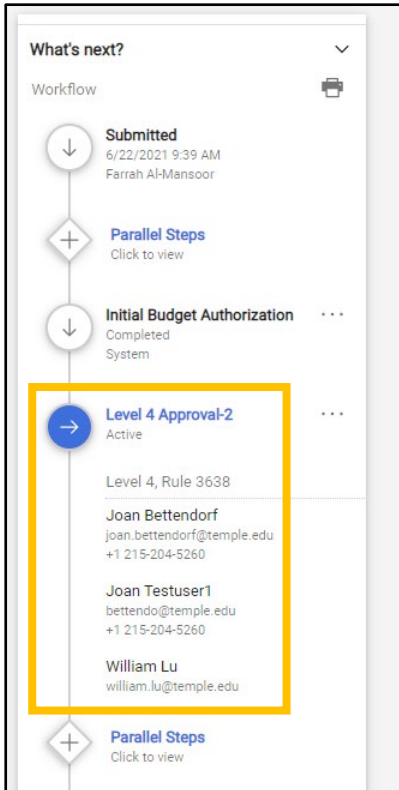
Workflow

- Submitted (6/22/2021 9:39 AM)
- Parallel Steps
- Initial Budget Authorization (Completed)
- Level 4 Approval-2 (Active)**
- Parallel Steps
- Second Budget Authorization (Future)
- Buyer Assignment (Future)
- Create PO (Future)
- Finish (Future)

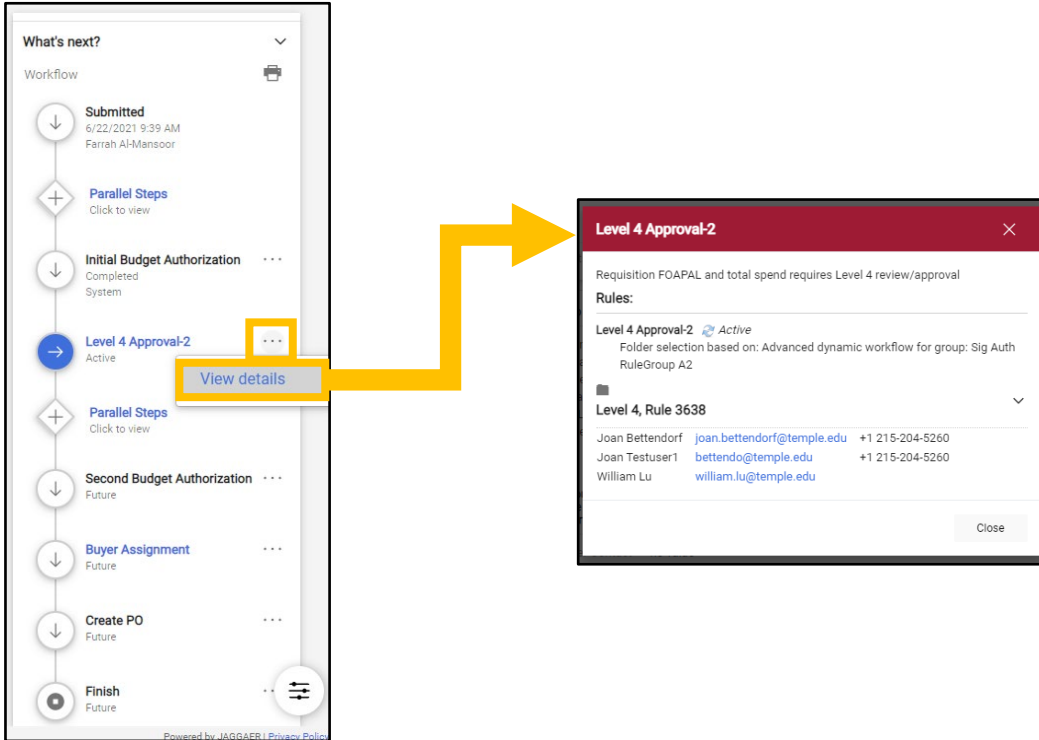
- 6. Some steps are hyperlinked – you can click on them to bring up more information:
 - 6.1. Some steps occur in parallel. Click on the “Parallel Steps” link to view the steps.



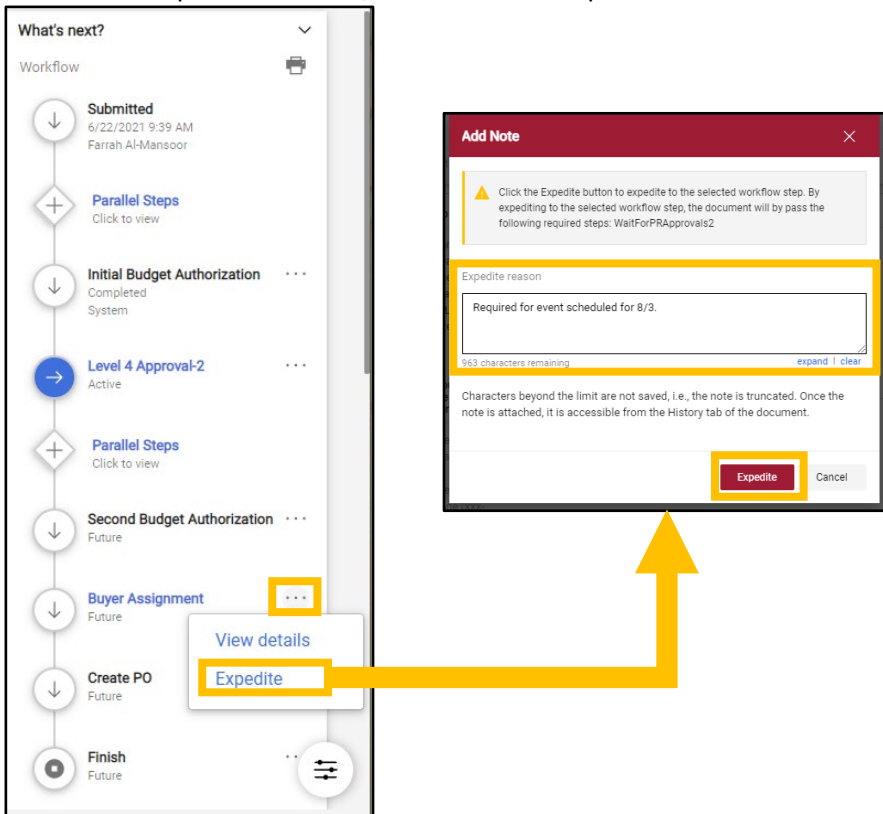
- 6.2. Click on other hyperlinked steps to see who the approvers are; they will appear below the step. Click the step again and the list of approvers will disappear again.



6.3. Click on the three dots next to the step to view more details about it.



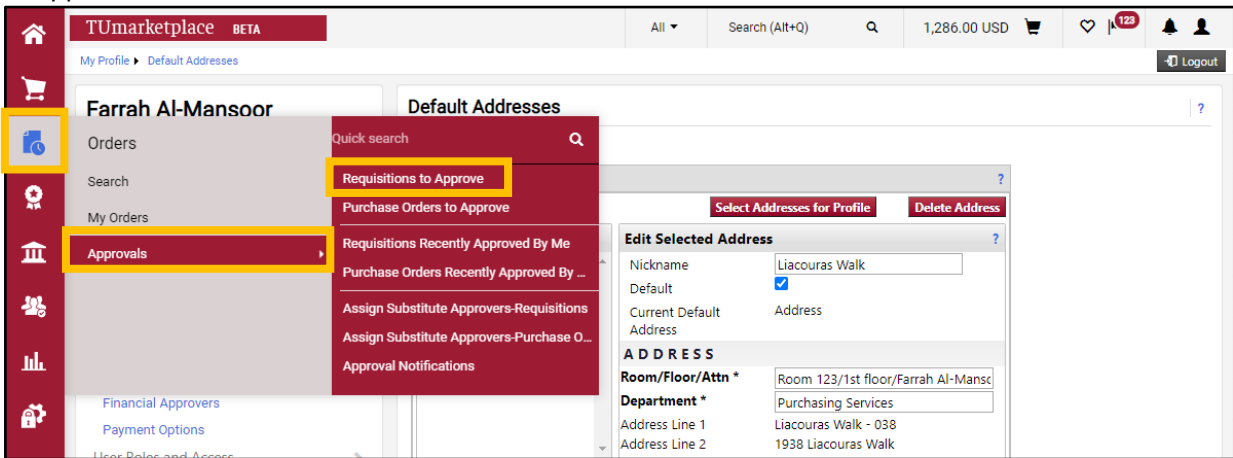
7. You can request to expedite some steps. If expediting is an option, it will appear when you click on the three dots next to the step. Add a reason, and then click "Expedite."



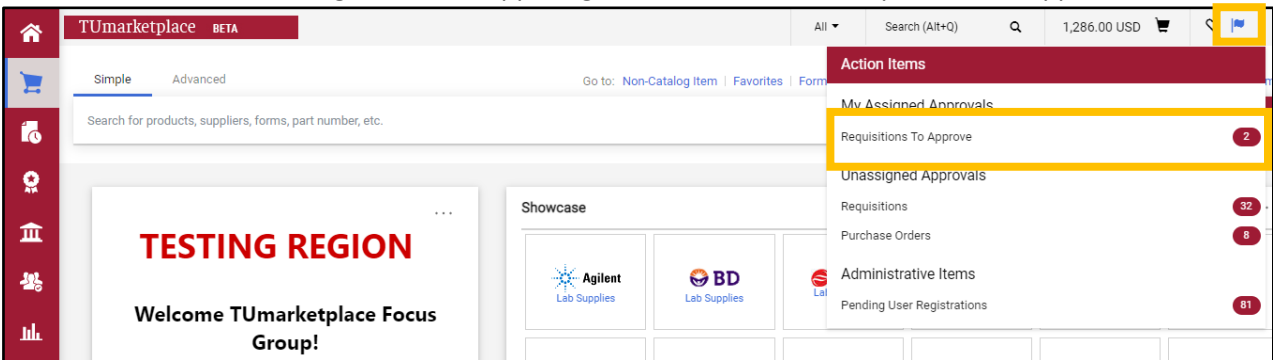
Approving a Purchase Requisition

Purpose: This guide will demonstrate the steps that designated approvers will take to approve submitted purchase requisitions. Completed purchase requisitions will be routed to approvers based upon the correct signature authority and dollar value of the requisition.

1. Log in to TUmarketplace.
2. Access your approvals in one of the two ways below:
 - 2.1. Hover over the Orders icon on the left side of the screen, hover over “Approvals”, and click on “Requisitions to Approve”.



- 2.2. Click on the Action Items flag icon in the upper right menu and select “Requisitions to Approve”.



3. Review the list of requisitions to be approved. Bring up a quick view of the requisition by clicking on the magnifying glass to the right of the requisition number.

Total Results Found: 2

All Dates Assign

Sort by: Submit date newest first

Hide requisition details expand all collapse all Results per folder: 20

Requisition No.	Suppliers	Assigned Approver	PR Date/Time	Requisitioner	Amount	Action
21291	Donnas O3	Farah Al-Mansoor	1/18/2018 9:23 AM	Donna Schweibenz	3,447.90 USD	Approve
Requisition Name 2018-01-18 donnas O3 No. of line items 2 Folders 0 Days in folder [My PR Approvals] 52 Days in folder [Buyer Name (for Purchasing Dept Only): Farrah Al-Mansoor: (All Values)]						
933272	Alpha DNA	Farah Al-Mansoor	3/5/2013 10:32 AM	Rahkeeta Rogers	85,000.00 USD	Approve
Requisition Name 2013-03-05 rahkeeta O2 No. of line items 1 Folders 3030 Days in folder [High Dollar Contract Purch]						

- Click "Approve" to approve the requisition or click "Assign" to assign it to yourself for review.

Document Navigator Display

Print Close

<Previous 16 of 31 Next>

Requisition Summary - 2309093

General	Shipping	Billing
Status Pending Contract Buyer Assignment Submitted 6/28/2018 11:23 AM Cart Name 2018-06-28 donnas 02 Description no value Priority Normal Prepared by Donna Schweibenz	Ship To Room/Floor/Attn 8th Fl/Donna L. Schweibenz Department Purchasing Carnell Hall 1803 N. Broad Street PHILADELPHIA, PA 19122-6095 United States If you are a Reviewer, enter your information here to be contacted with order status information: Order Contact Area Code Order Contact Phone Order Contact Email no value no value no value Delivery Options Ship Via Best Carrier-Best Way	Bill To Accounts Payable 215-926-2032 1852 N. 10th Street (082-11) 1st floor, TASB Philadelphia, PA 19122 United States Billing Options Accounting Date 6/23/2018 TPCard (<\$5K)

Close

- If the quick view option does not provide enough information for you to approve, you may also click directly on the requisition number to review the requisition in its entirety.

Requisition : 2309093

Summary PO Preview Comments Attachments History

General	Shipping	Billing
Status Pending Contract Buyer Assignment Submitted 6/28/2018 11:23 AM Cart Name 2018-06-28 donnas 02 Description no value Priority Normal Prepared by Donna Schweibenz	Ship To Room/Floor/Attn 8th Fl/Donna L. Schweibenz Department Purchasing Carnell Hall 1803 N. Broad Street PHILADELPHIA, PA 19122-6095 United States If you are a Reviewer, enter your information here to be contacted with order status information: Order Contact Area Code Order Contact Phone Order Contact Email no value no value no value	Bill To Accounts Payable 215-926-2032 1852 N. 10th Street (082-11) 1st floor, TASB Philadelphia, PA 19122 United States Billing Options Accounting Date 6/23/2018

Pending

Total (300,500.00 USD)

Subtotal 300,500.00

300,500.00

Assign To Myself

What's next?

Workflow

- ↓
Submitted
 6/28/2018 11:23 AM
 Donna Schweibenz
- ↓
Spend Over Contract Review
 Notification Sent
- ↓
Fiscal Year End
 Approved
 Donna Schweibenz

- Click "Assign to Myself" if you wish to review the requisition or click the down arrow and then select "Approve" to approve the requisition.

Requisition : 2309093

Summary PO Preview Comments Attachments History

General	Shipping	Billing
Status Pending Contract Buyer Assignment Submitted 6/28/2018 11:23 AM Cart Name 2018-06-28 donnas 02 Description no value Priority Normal Prepared by Donna Schweibenz	Ship To Room/Floor/Attn 8th Fl/Donna L. Schweibenz Department Purchasing Camell Hall 1803 N. Broad Street PHILADELPHIA, PA 19122-6095 United States If you are a Reviewer, enter your information here to be contacted with order status information: Order Contact Area Code no value Order Contact Phone (xxx-xxxx) no value Order Contact Email no value	Bill To Accounts Payable 215-926-2032 1852 N. 10th Street (082-11) 1st floor, TASB Philadelphia, PA 19122 United States Billing Options Accounting Date 6/23/2018

Pending

Total (300,500.00 USD)	▼
Subtotal	300,500.00
	300,500.00

Assign To Myself ▼

Approve

Workflow

- ↓
Submitted
 6/28/2018 11:23 AM
 Donna Schweibenz
- ↓
Spend Over Contract Review ...
 Notification Sent
- ↓
Fiscal Year End ...
 Approved
 Donna Schweibenz

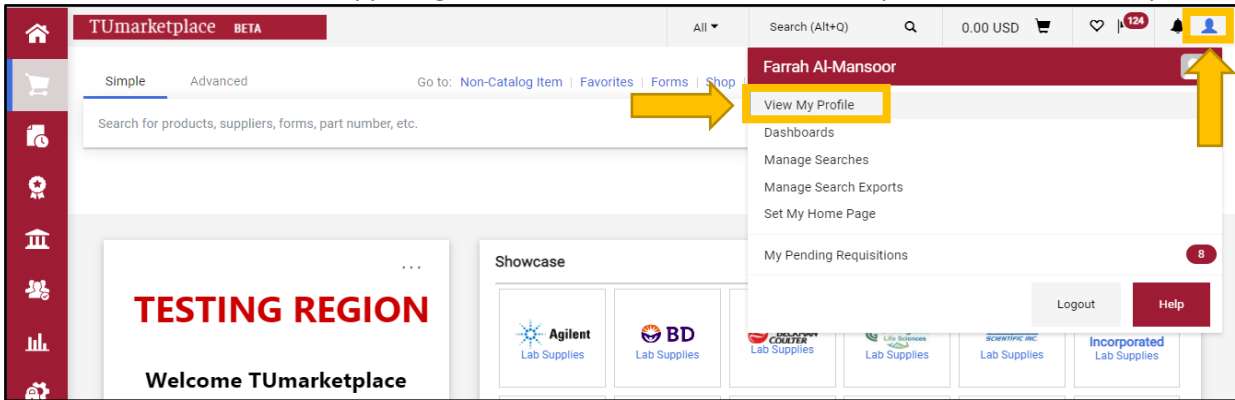
Approving via Email

Purpose: This guide will demonstrate how to configure your TUmarketplace profile to allow you to approve requisitions via email, either from your computer or your mobile device.

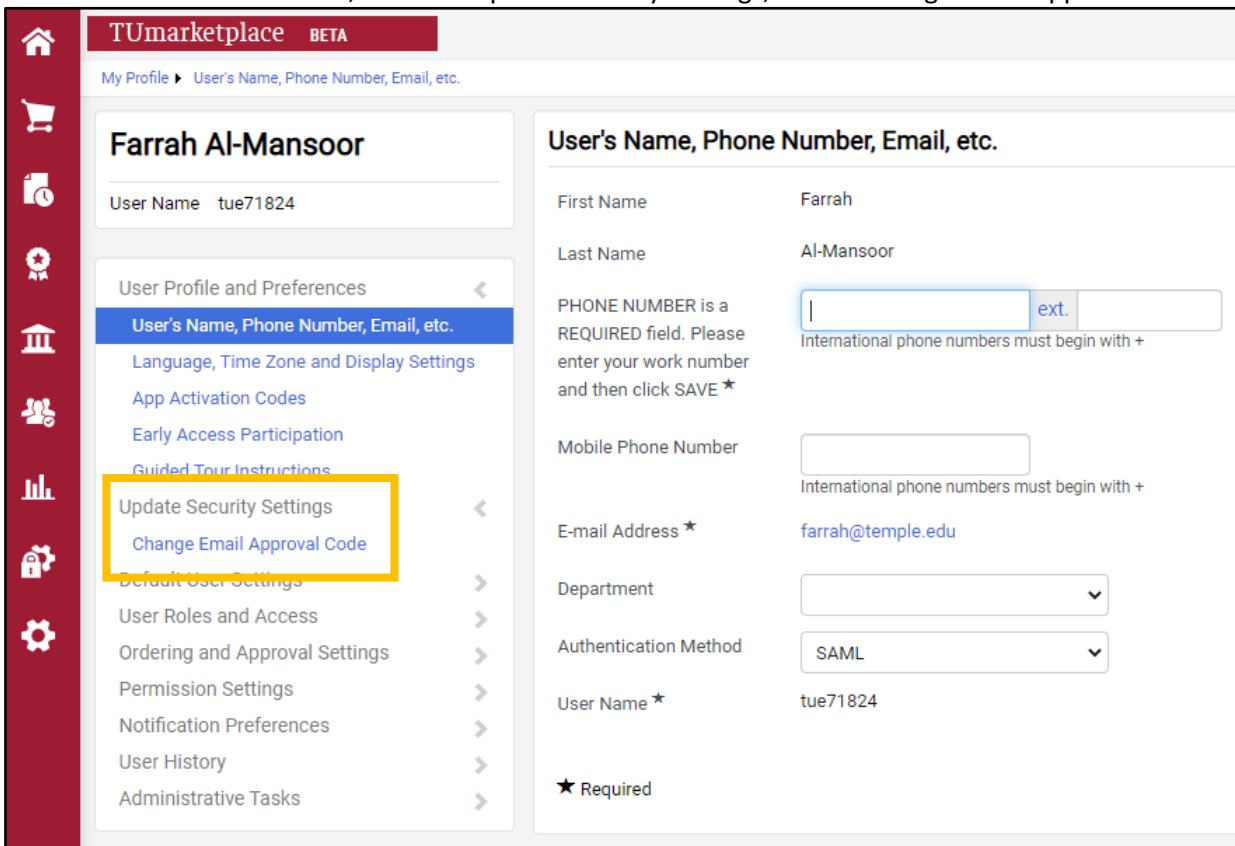
1. Creating your approval PIN:

1.1. Log in to TUmarketplace.

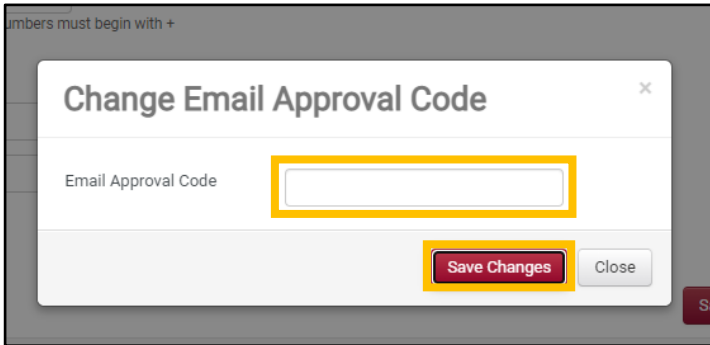
1.2. Click on the user icon in the upper right-hand corner and choose “View My Profile” from the dropdown.



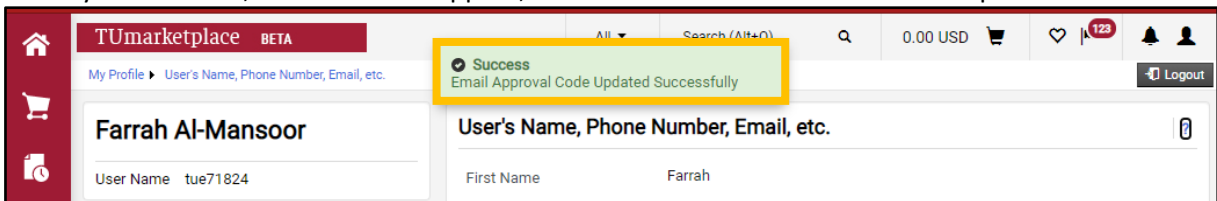
1.3. On the left side of the screen, click on “Update Security Settings,” then “Change Email Approval Code”.



- 1.4. When the dialog box appears, choose a code using a minimum of four characters - alpha, numeric, or a combination of both. The code is case sensitive and there is no limit to the number of characters used. Once entered, click "Save Changes."

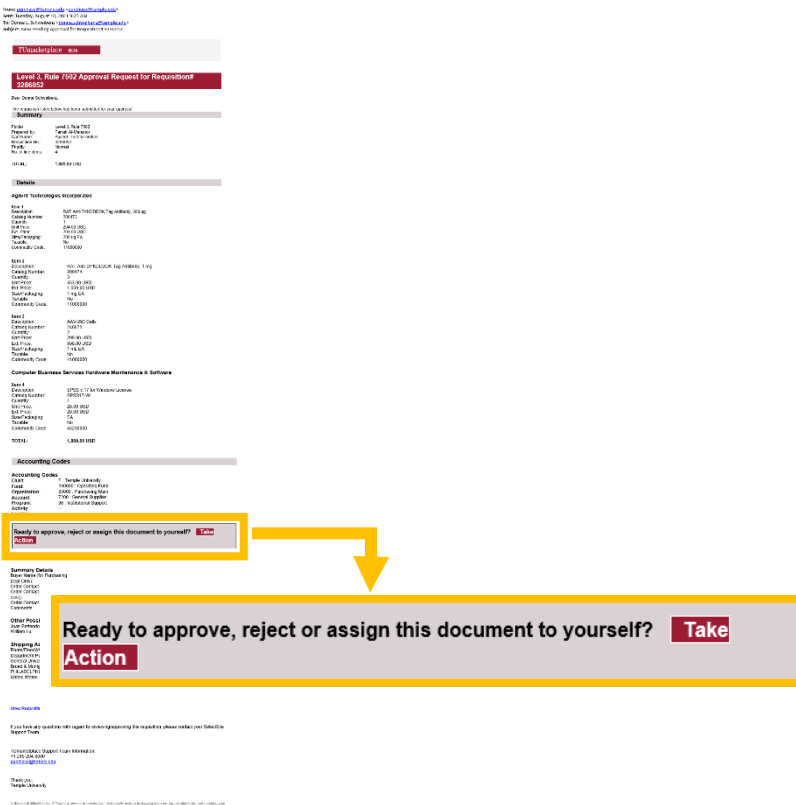


- 1.5. When you click save, the box will disappear, and a confirmation will flash at the top of the screen.



2. Approving requisitions on your mobile device:

- 2.1. An email will be sent to the address specified in your profile notifying you of requisitions requiring your approval. Access the email from your mobile device , scroll down to the box with the "Take Action" button, and click that link.



2.2. "Actions" section. Enter your approval code (created in step 1 above), enter a comment if applicable, and click "Approve". A confirmation will flash on the screen.

TUmarketplace BETA

Requisitions: 3286052

Owner: Farrah Al-Mansoor
Total: 1,889.00 USD
Discount: 0.00 USD
Tax1: 0.00 USD
Tax2: 0.00 USD
Shipping: 0.00 USD
Handling: 0.00 USD
Priority: Normal
No. of line items: 4
Suppliers: Agilent Technologies Incorporated, Computer Business Services Hardware Maintenance & Software
Assigned To: Not Assigned

- > Shipping
- > Billing
- > TPCard (<\$5K)
- > Accounting Codes
- > Internal Notes and Attachments
- > External Notes and Attachments
- > Line Items
- > Other Approvers 2

Actions

Approval Code *

Comment

TUmarketplace BETA

Shipping: 0.00 USD
Handling: 0.00 USD
Priority: Normal
No. of line items: 4
Suppliers: Agilent Technologies Incorporated, Computer Business Services Hardware Maintenance & Software
Assigned To: Not Ass

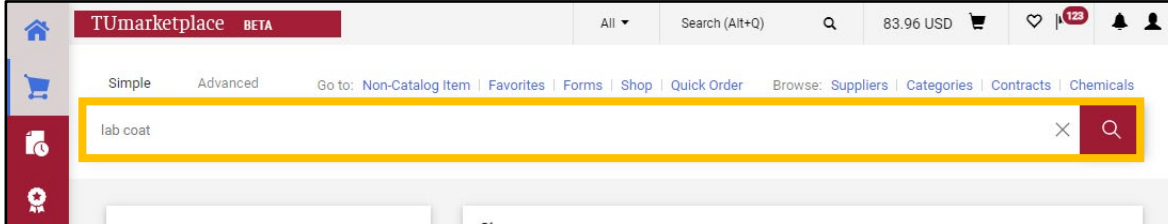
Success
Requisitions has been Approved successfully!

- > Shipping
- > Billing
- > TPCard (<\$5K)
- > Accounting Codes
- > Internal Notes and Attachments
- > External Notes and Attachments
- > Line Items
- > Other Approvers 2

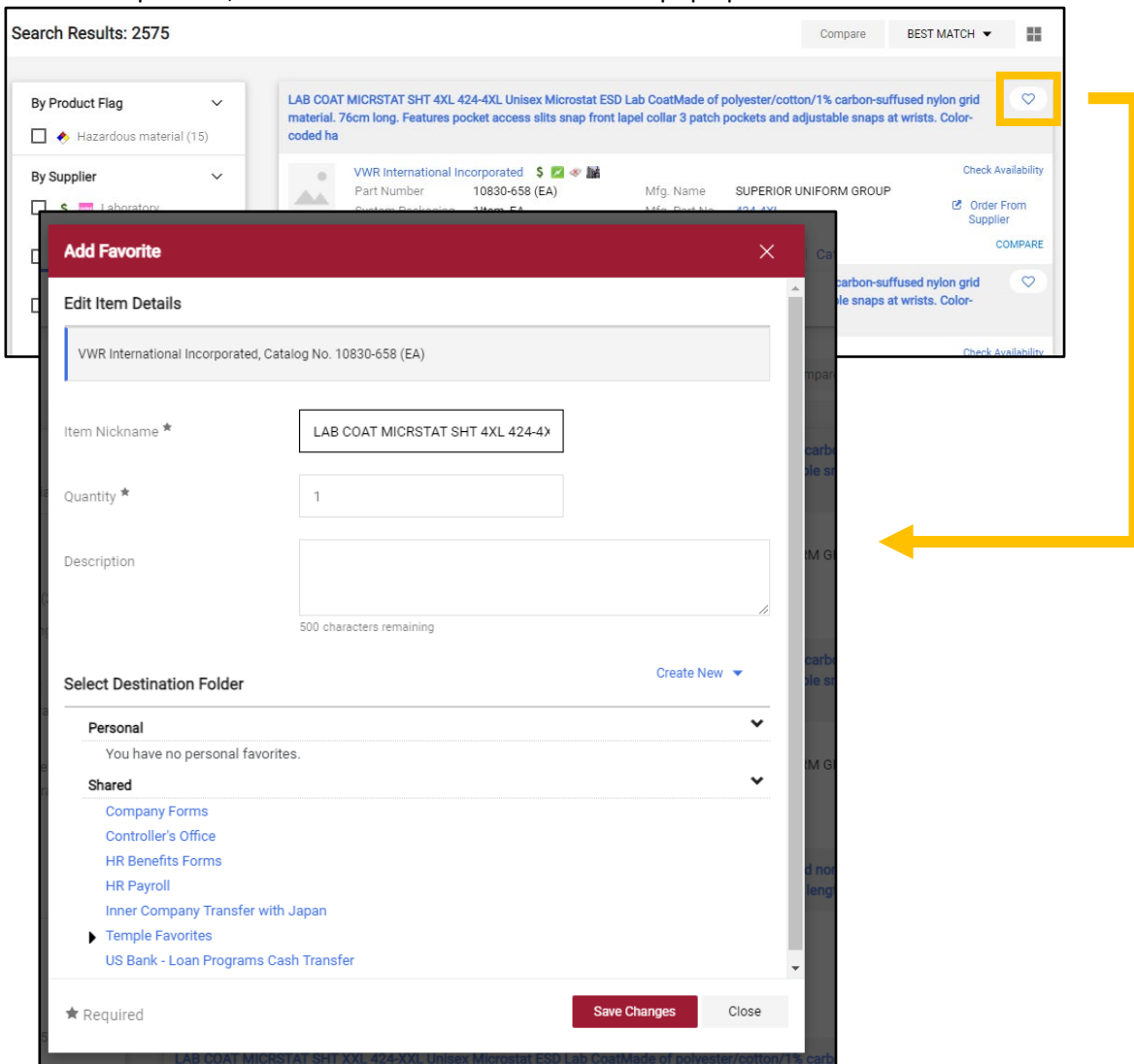
Managing Your TUmarketplace Favorites

Purpose: As you use TUmarketplace more, you may notice that you begin to either order or search for some items repeatedly. To save time, you may store these items as favorites. This guide will show you how to create and manage your favorites.

1. Log in to TUmarketplace.
2. Search for your item.



3. Among the search results, find the item that you would like to make a favorite, then click the heart outline icon next to the product, and the "Add Favorite" window will pop up.



4. Edit the item details:

- 4.1. Update the item nickname if you wish.
- 4.2. If you will typically order a certain quantity of the item, enter that number in the quantity field.
- 4.3. If one would be useful, enter a product description.

- 5. Select which folder to use as the destination for your item. There are two master folders, Personal and Shared. The Personal folder is accessible only to you, while the Shared folder stores favorites that can be accessed by anyone in TUmarketplace.
 - 5.1. If this is the first time you are adding a favorite, you may need to create a new folder. Click on the “Create New” link. You will be given the option of where to place this new folder. Since this is the first folder, this

will be a top-level personal folder. As your use of TUmarketplace increases, you may create as many folders as you find necessary to organize your favorites.

The screenshot shows the 'Add Favorite' dialog box with the following details:

- Edit Item Details:**
 - Item Name: VWR International Incorporated, Catalog No. 10830-658 (EA)
 - Item Nickname: 4xl lab coats
 - Quantity: 5
 - Description: LAB COAT MICRSTAT SHT 4XL 424-4XL Unisex Microstat... CoatMade of polyester/cotton/1% carbon-suffused material. 76cm long. Features pocket access slits... (261 characters remaining)
- Select Destination Folder:**
 - Personal: You have no personal favorites.
 - Shared:
 - Company Forms
 - Controller's Office
 - HR Benefits Forms
 - HR Payroll
 - Inner Company Transfer with Japan
 - ▶ Temple Favorites
 - US Bank - Loan Programs Cash Transfer

A yellow callout box highlights the 'Create New' button and provides instructions:

- Top level personal folder
- Top level shared folder
- Subfolder of selected folder

Buttons at the bottom include 'Save Changes' and 'Close'.

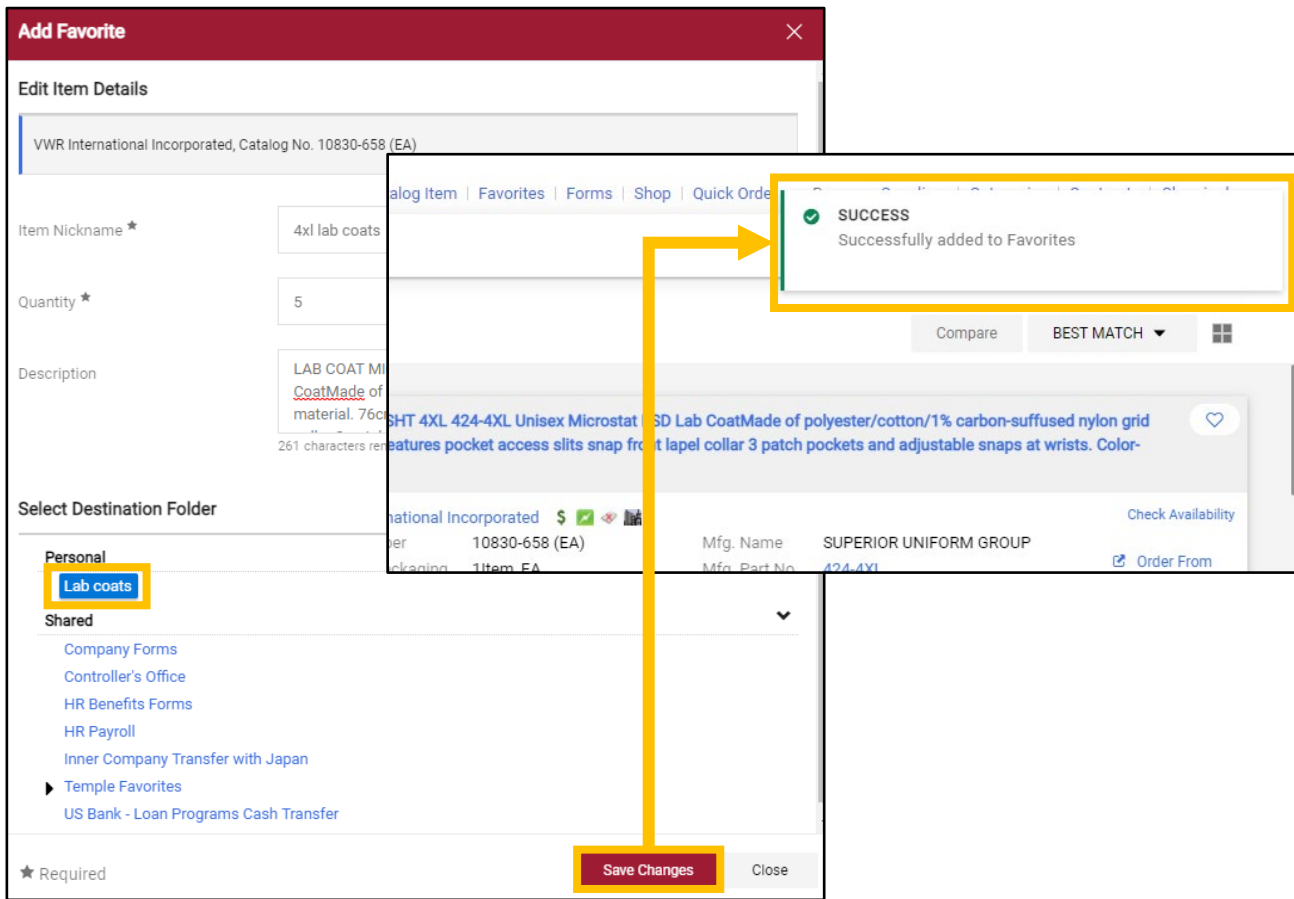
5.2. A new box will appear where you will enter a name for the folder. You can also enter a description if you wish. Click "Save Changes" when complete. You will be taken back to the "Add Favorite" window.

The screenshot shows the 'Create Personal Folder' dialog box with the following details:

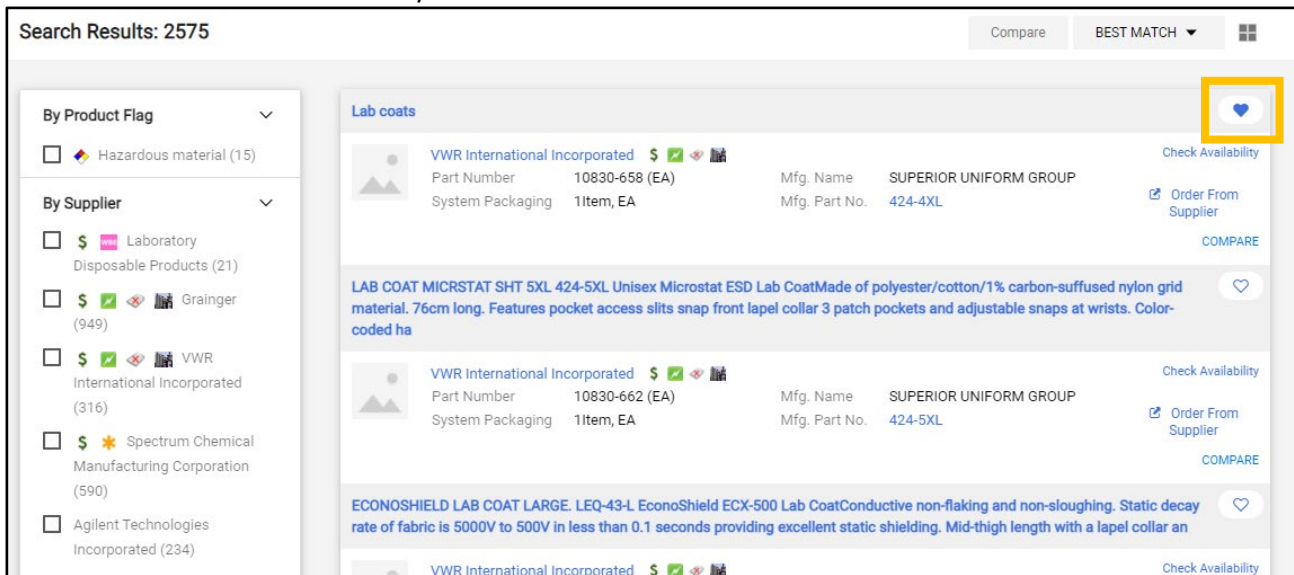
- Name:** Lab coats
- Description:** For Dr. Maury's lab. (234 characters remaining)

Buttons at the bottom include 'Save Changes' and 'Close'.

- Click "Save Changes" to save the favorite in the selected folder. A confirmation window will appear showing that you have successfully favorited the item.

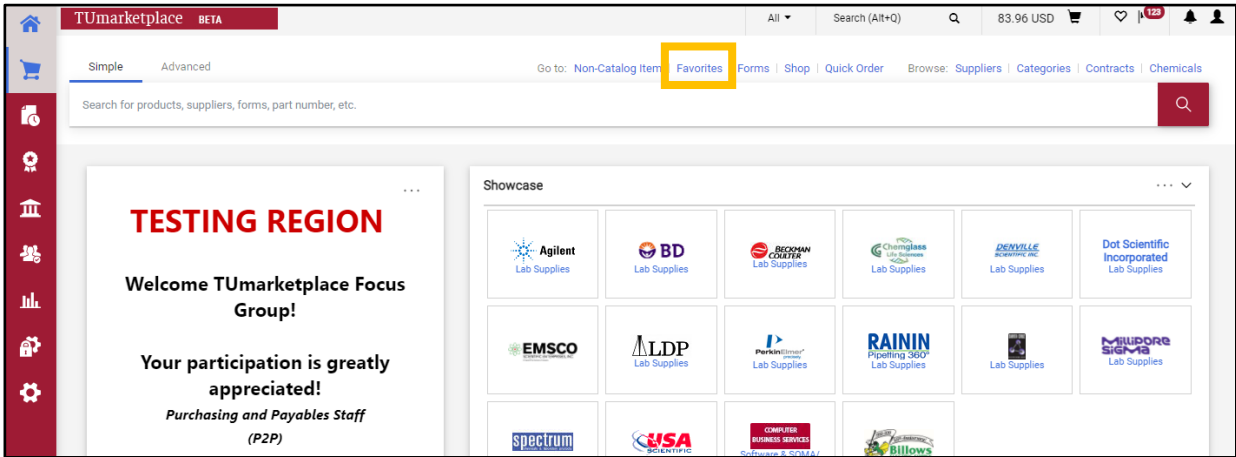


- Favorited items will be indicated by a heart filled-in with blue.

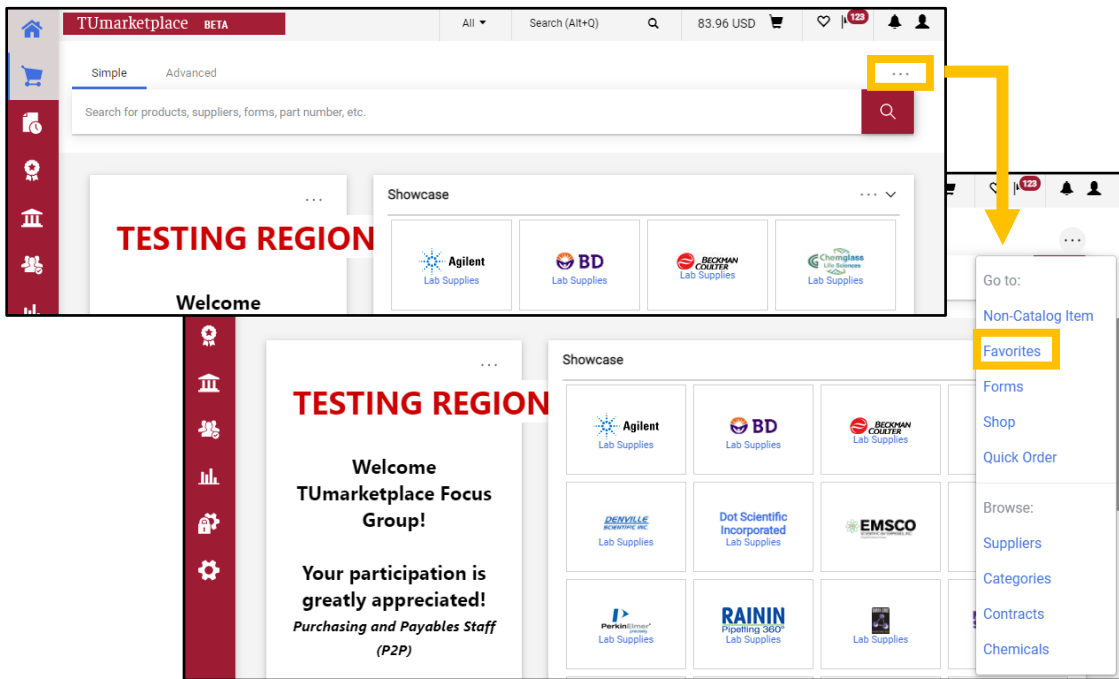


8. Navigate to your favorites using the link at the top of each TUportal page:

a. If your window is wide enough, this will appear above the search bar.



b. If your window is too small, you must click the three dots above the search bar, and then click the “Forms” link.

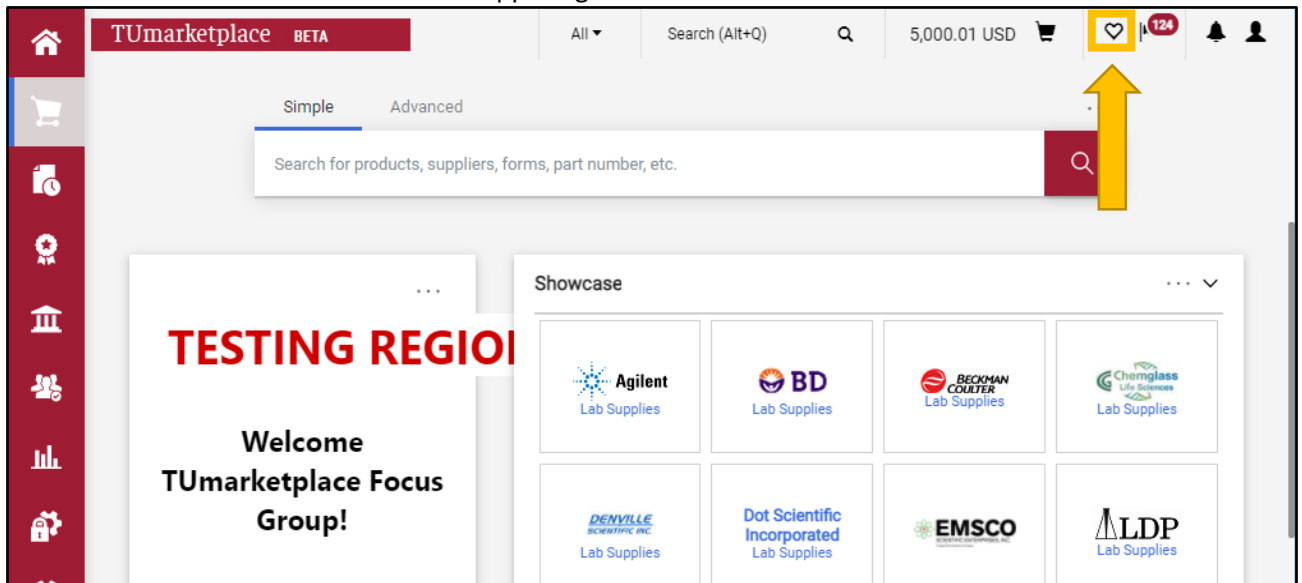


Adding and Modifying Bookmarks

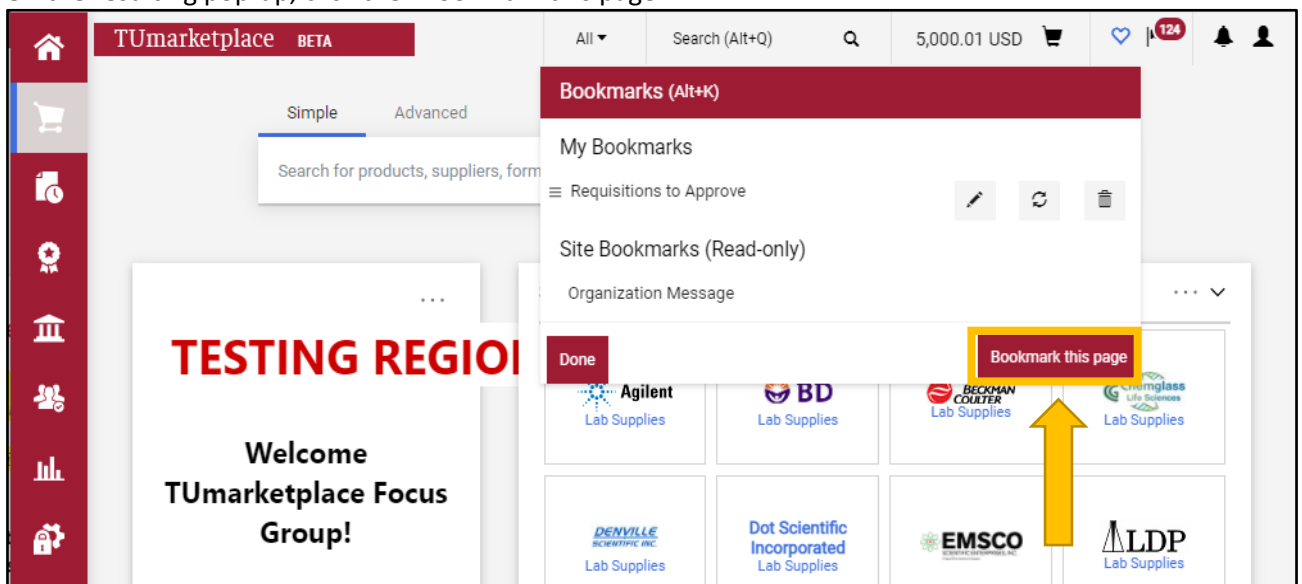
Purpose: TUmarketplace allows users to bookmark pages that they use frequently. The purpose of this document is to demonstrate how to add and modify bookmarks in TUmarketplace.

1. To add a bookmark:

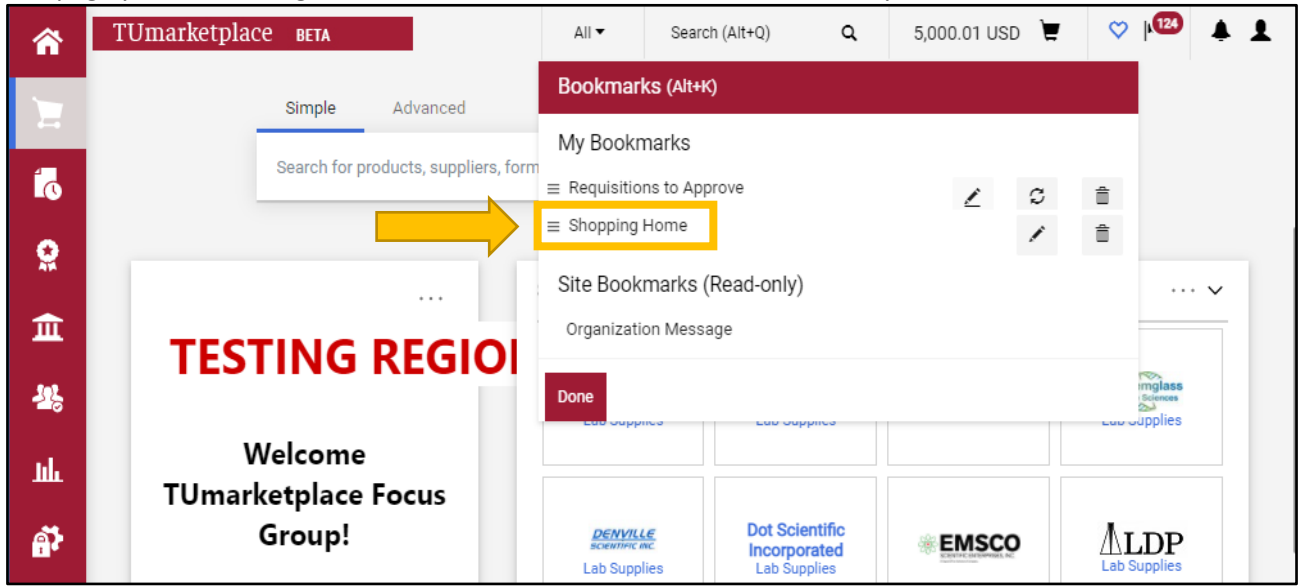
- 1.1. Log into TUmarketplace and navigate to the page you wish to bookmark.
- 1.2. Click on the bookmark heart icon in the upper right-hand corner.



1.3. On the resulting pop-up, click the “Bookmark this page” link.

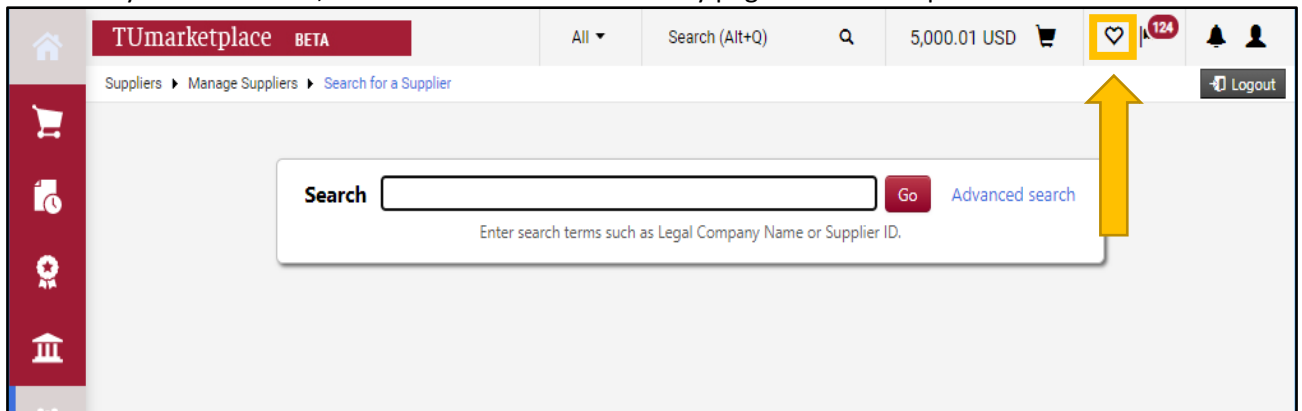


1.4. The page you are viewing will be saved as a bookmark. It will automatically have a name.

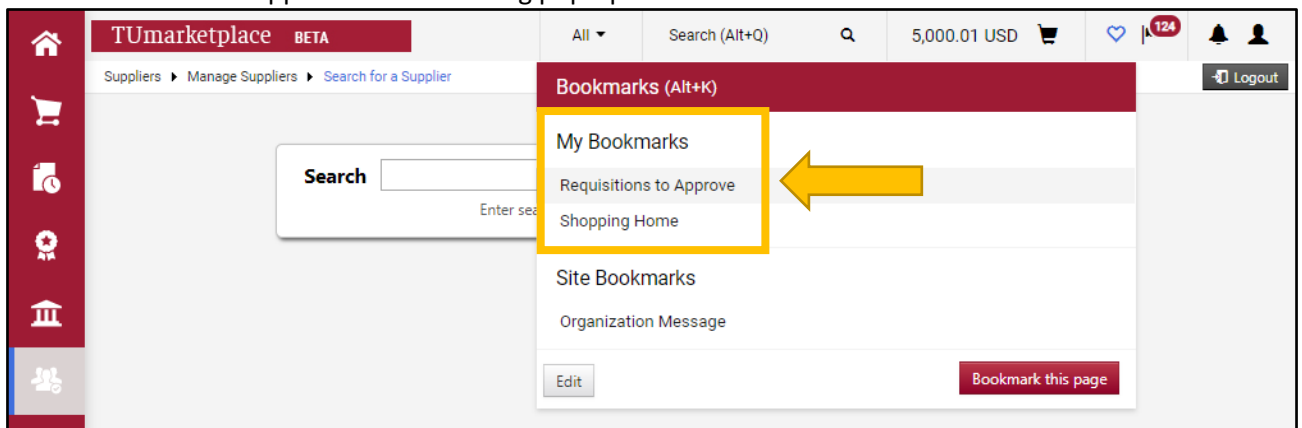


2. To access your bookmarks:

2.1. To access your bookmarks, click on the heart icon from any page in TUmarketplace.

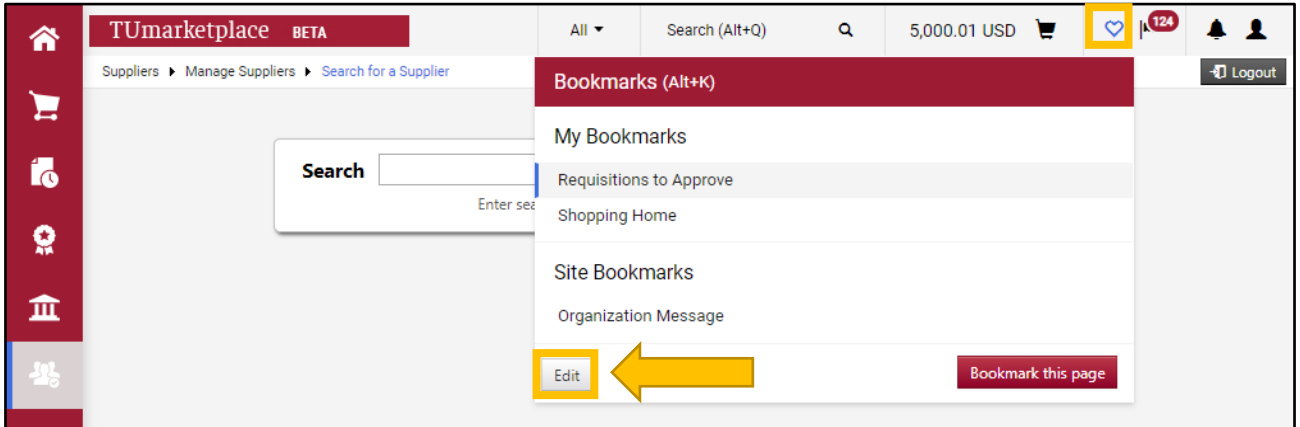


2.2. Your bookmarks will appear on the resulting pop-up.

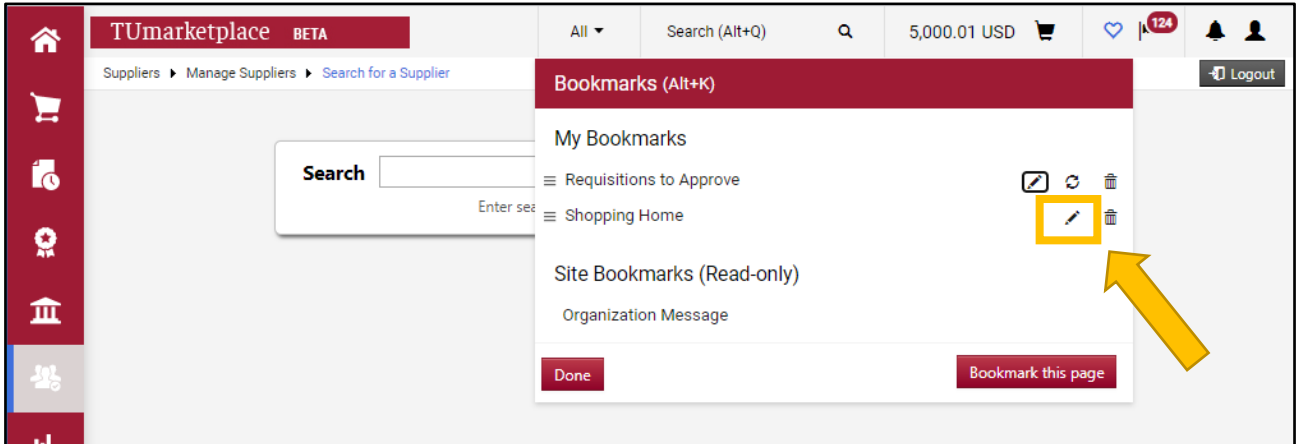


3. To rename a bookmark:

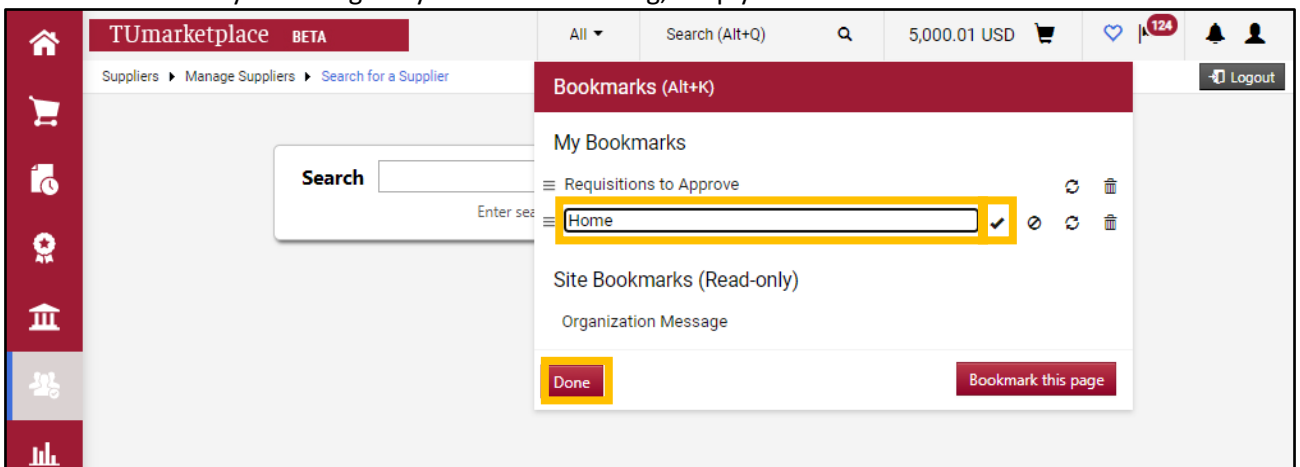
3.1. Click on the heart icon at the top right of the page and click “Edit” on the pop-up.



3.2. Click on the pencil next to the bookmark whose name you would like to change.

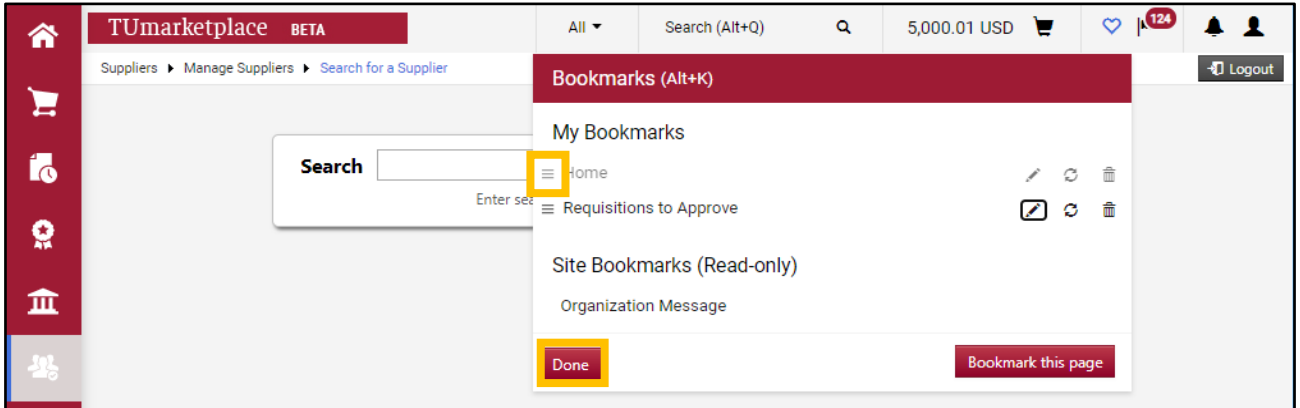


3.3. Type in the updated name in the text box that appears. If you wish to edit another bookmark, first click the checkmark to save your change. If you are done editing, simply click the “Done” button.



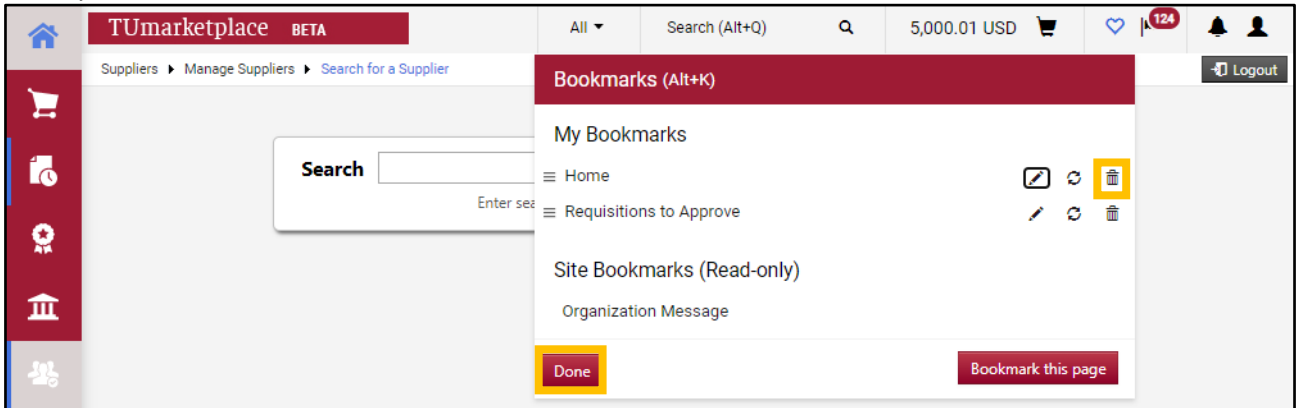
4. To reorder your bookmarks:

4.1. Follow steps 3.1 and 3.2 above. Click the three horizontal lines next to the bookmark you wish to move and drag it to the desired position. Click “Done” when you are finished.



5. To delete your bookmarks:

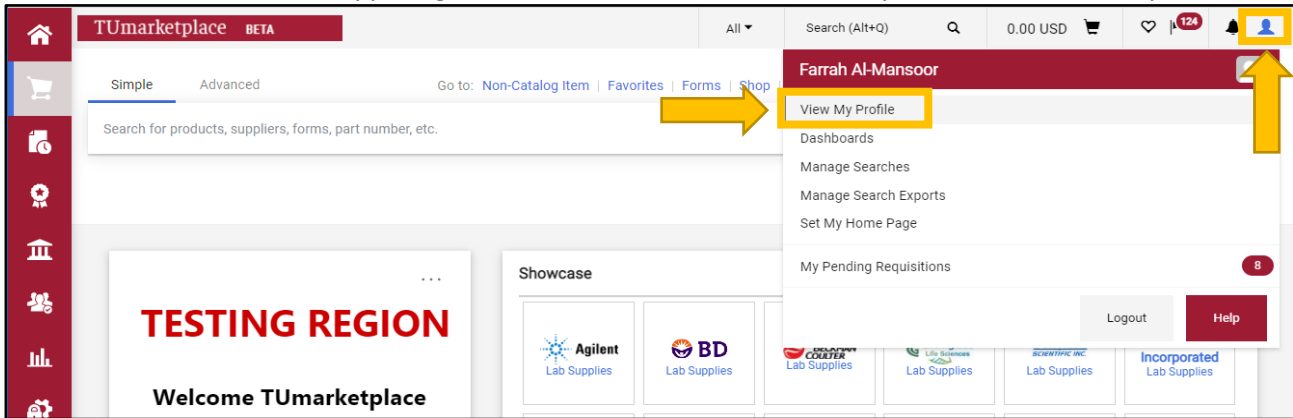
5.1. Follow steps 3.1 and 3.2 above. Click the trashcan next to the bookmark you wish to delete. Click “Done” when you are finished.



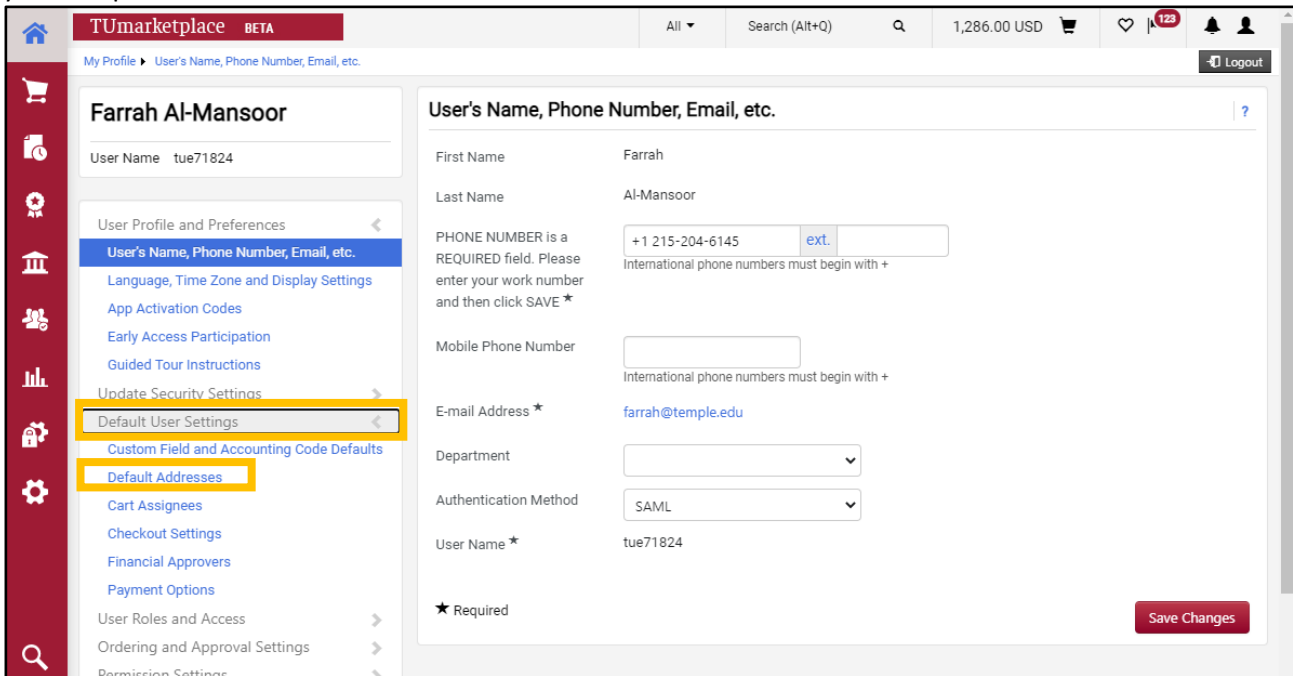
Setting Your Shipping Addresses

Purpose: In your profile, you must set up your default address with a room and floor number for your products to be delivered. Entering your default address will eliminate the need to enter it on each new request. The purpose of this guide is to show you how to set up your default shipping addresses.

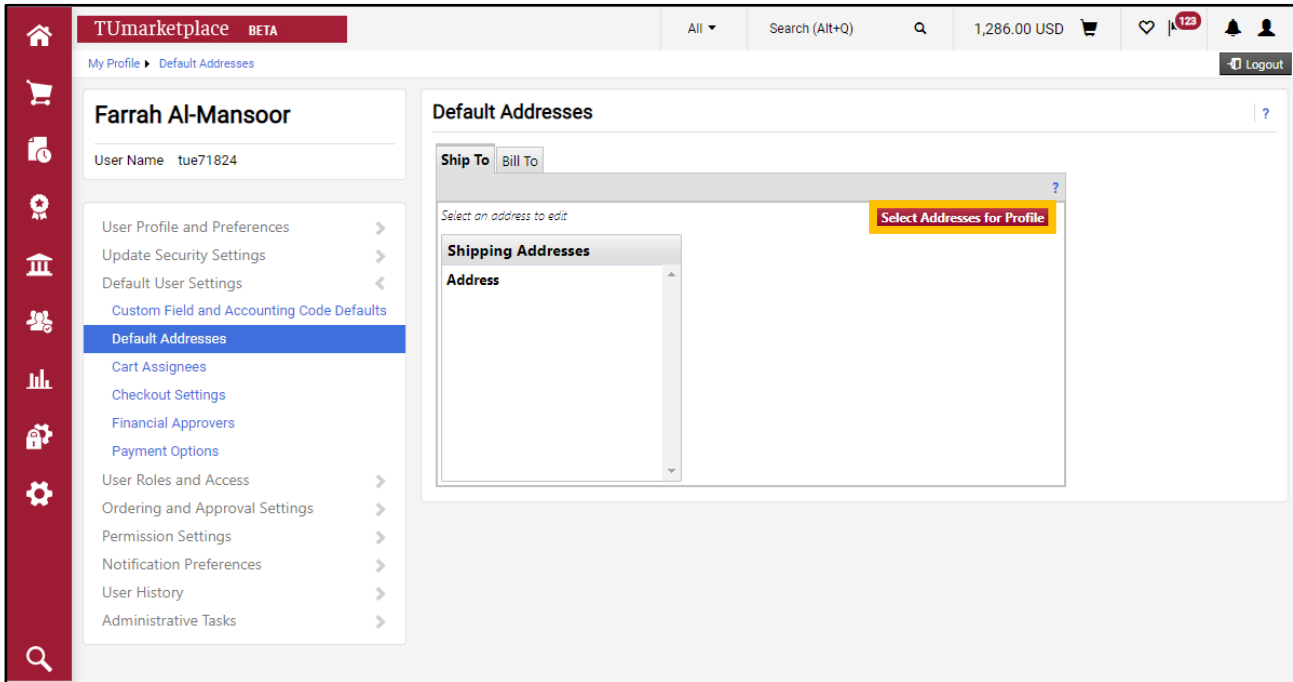
1. Log in to TUmarketplace.
2. Click on the user icon in the upper right-hand corner and choose "View My Profile" from the dropdown.



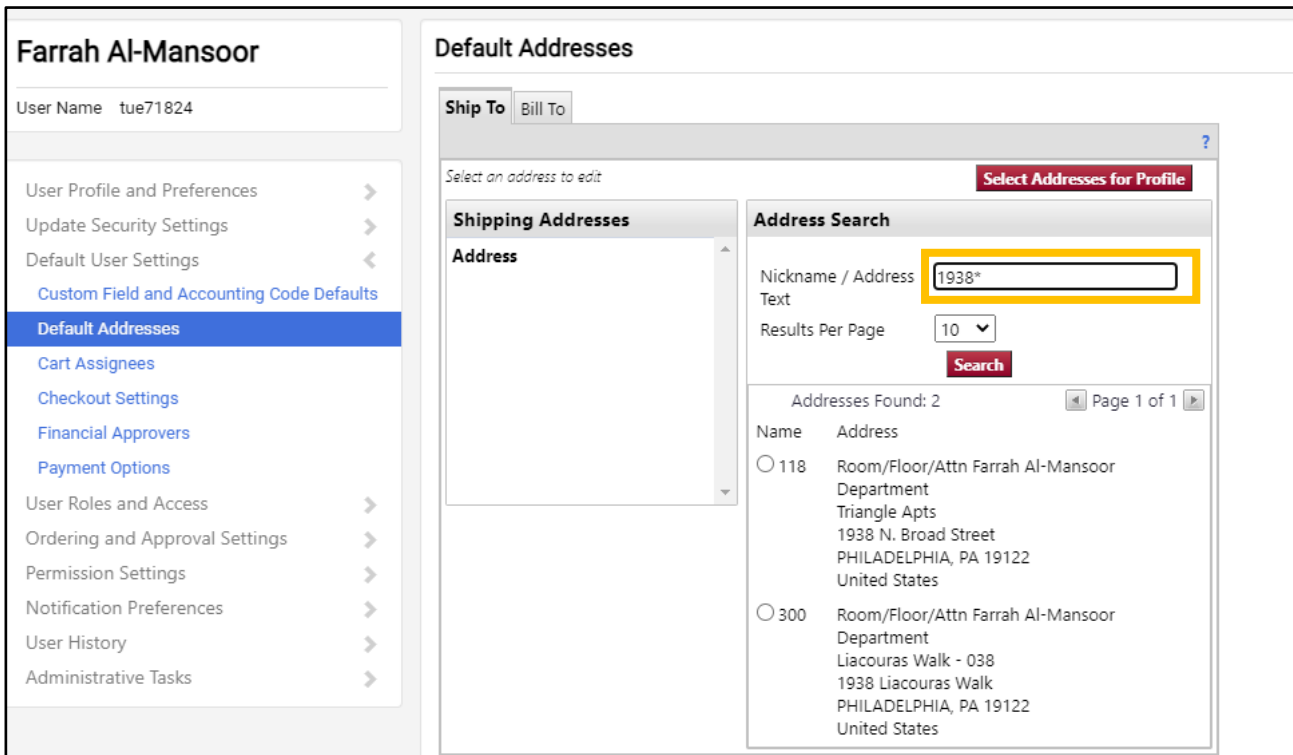
3. Once in the profile screen, navigate to the left side of the screen and click on "Default User Settings," then click on "Default Addresses." This will pull up your address information and you will be able to either edit or enter your "Ship To" and "Bill To" addresses.



4. Click the “Select Addresses for Profile” button.



5. A search window will appear. Search for your address by entering the name of your building. When doing a search for your address template, remember to use an asterisk at the end of any partial search term.



6. Select the correct address from the search results, add your information (see points below), then click save.

6.1. If you have more than one address, you will be able to name each address in the nickname field and select which address will be your default.

- 6.2. Enter your room, floor, and attention. Please note: **it is essential that a room and floor number appear before your name.** Suppliers' carriers, UPS, Fed-Ex, and DHL will have a character limit on their shipping labels, which will truncate your delivery information.
- 6.3. Enter your department name in the "Department" field.

Farrah Al-Mansoor
User Name tue71824

- User Profile and Preferences >
- Update Security Settings >
- Default User Settings <
- Custom Field and Accounting Code Defaults
- Default Addresses**
- Cart Assignees
- Checkout Settings
- Financial Approvers
- Payment Options
- User Roles and Access >
- Ordering and Approval Settings >
- Permission Settings >
- Notification Preferences >
- User History >

Default Addresses

Ship To Bill To

Select an address to edit Select Addresses for Profile Delete Address

Shipping Addresses	
Address	

Edit Selected Address	
Nickname	Liacouras Walk
Default	<input checked="" type="checkbox"/>
Current Default Address	Address
ADDRESS	
Room/Floor/Attn *	Room 123/1st floor/Farrah Al-Mansoor
Department *	Purchasing Services
Address Line 1	Liacouras Walk - 038
Address Line 2	1938 Liacouras Walk
City	PHILADELPHIA
State	PA
Zip Code	19122
Country	United States
	Save

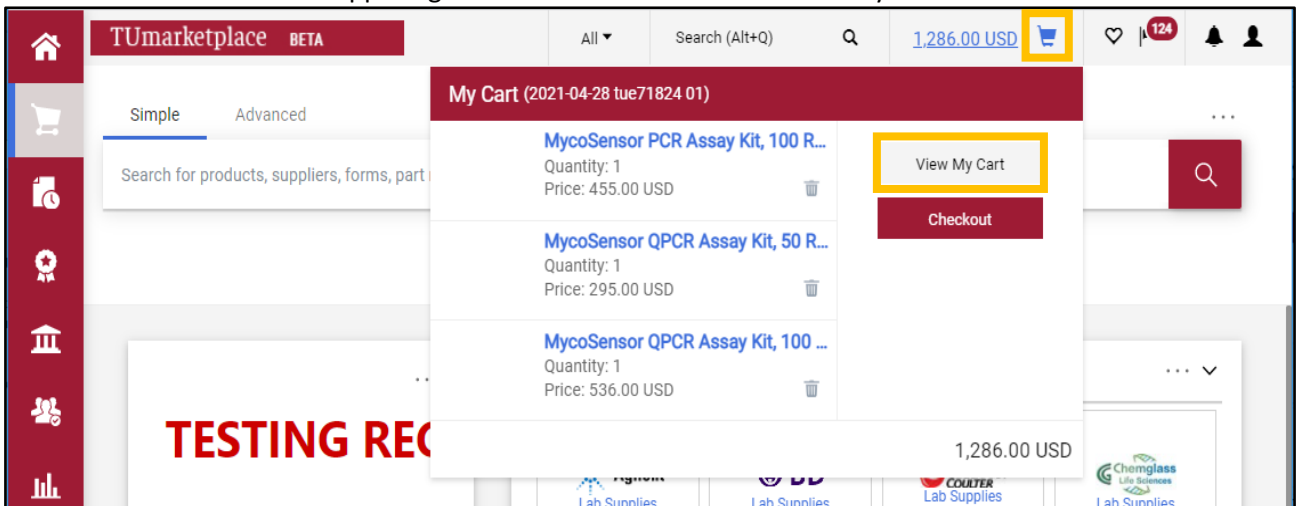
Note: The Bill To address will default to the Accounts Payable Address. **Do not change this address.**

Adding/Modifying Your FOAPAL Codes on a Requisition

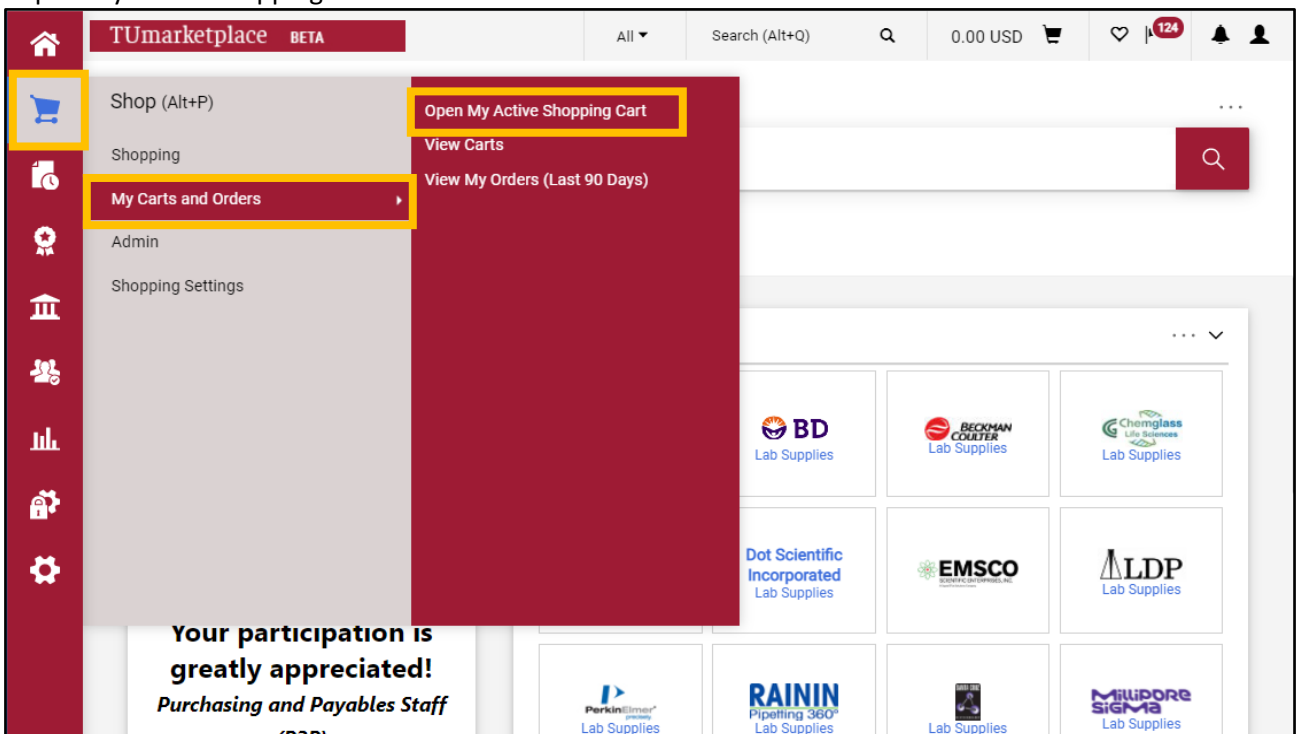
Purpose: This guide demonstrates how to input FOAPAL codes on specific orders, either by adding the codes if those fields are blank or by editing them if they are set to your default FOAPAL.

1. View your cart by doing one of the following:

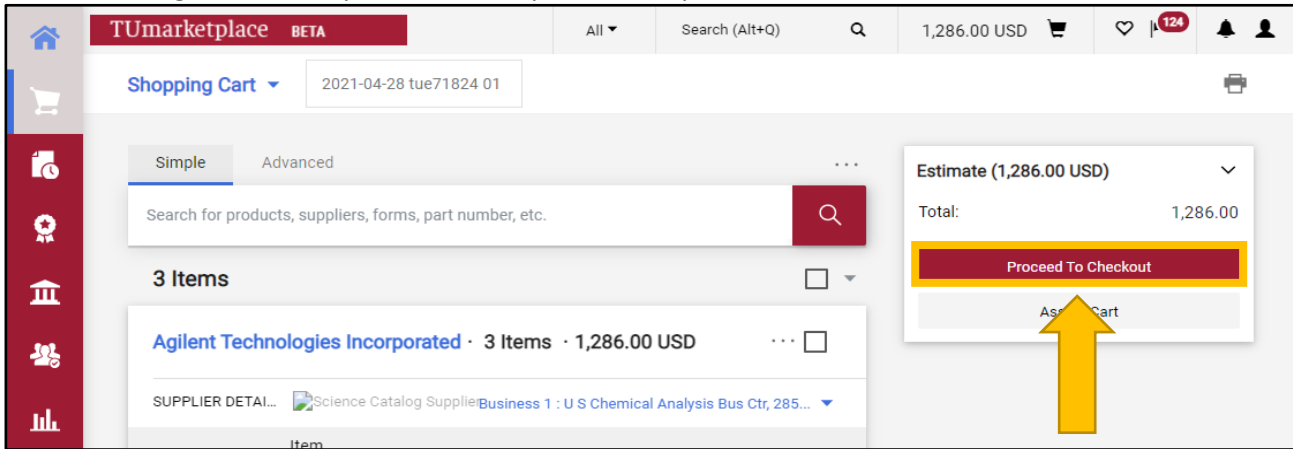
1.1. Click on the cart icon in the upper right-hand corner and choose “View My Cart”.



1.2. Hover over the cart icon on the far left of the screen, and then hover over “My Carts and Orders”. Choose “Open My Active Shopping Cart”.

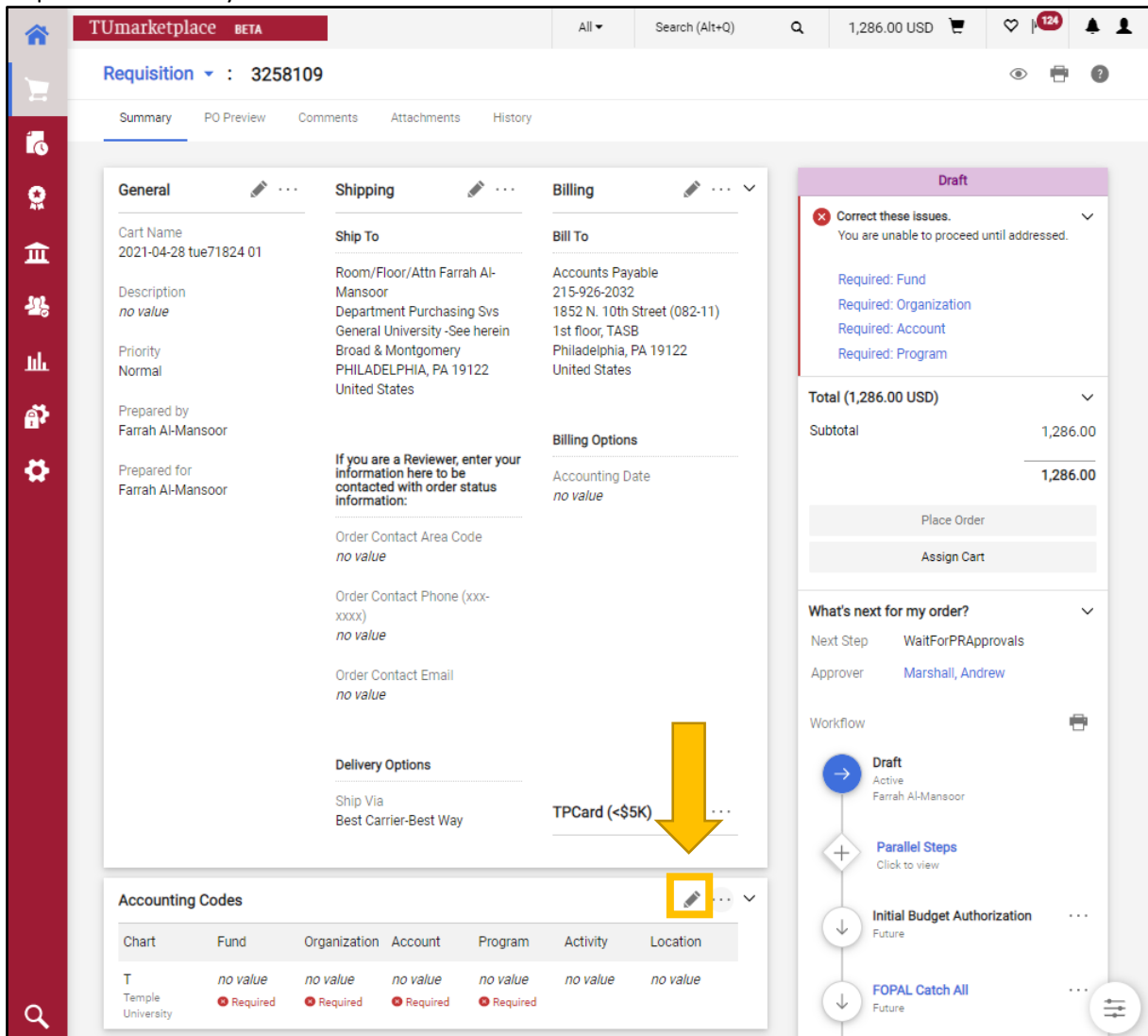


- After reviewing the items in your cart and if you are ready to check out, click the “Proceed to Checkout” button.



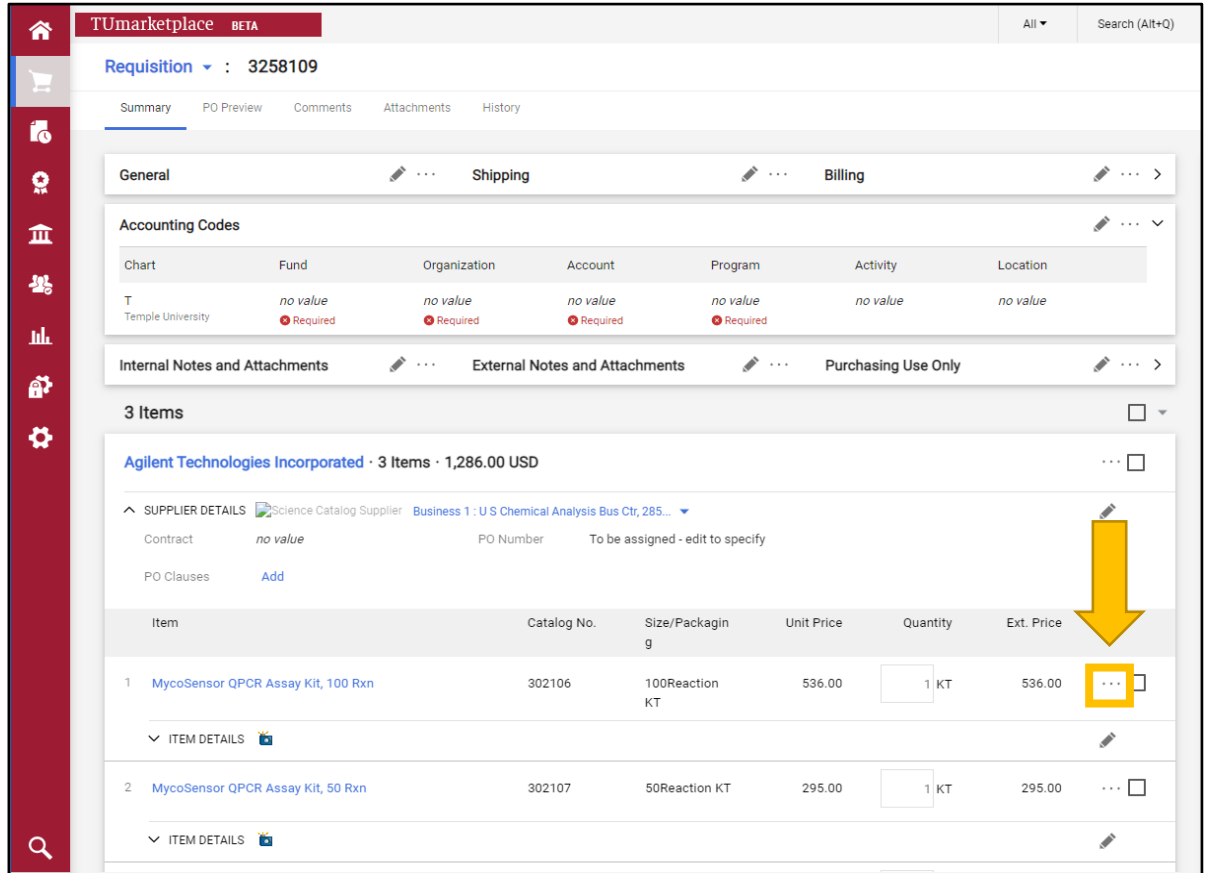
- You will be taken to a summary of your requisition. You can either edit your FOAPAL codes for the entire order, or for an individual item:

- To edit your FOAPAL codes for the **entire order**, click on the pencil in the “Accounting Codes” section of the requisition summary.

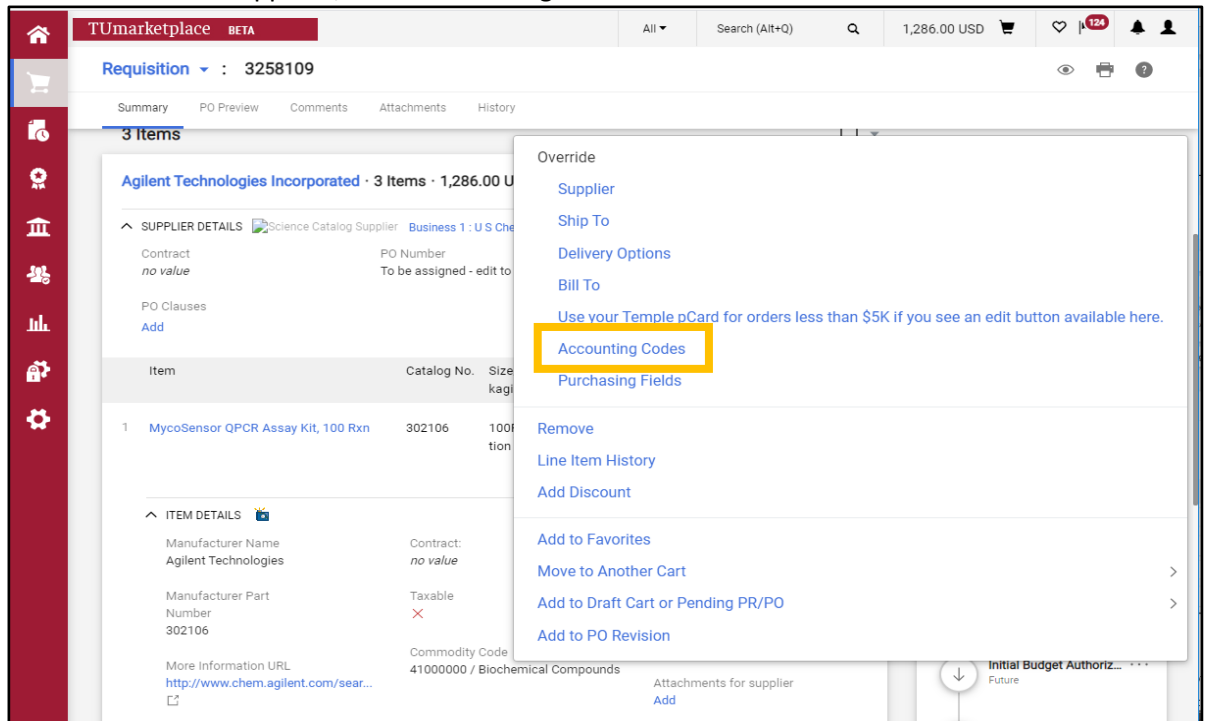


3.2. To edit your FOAPAL codes for an **individual item**:

3.2.1. Click on the three dots next to the price associated with that particular line item.



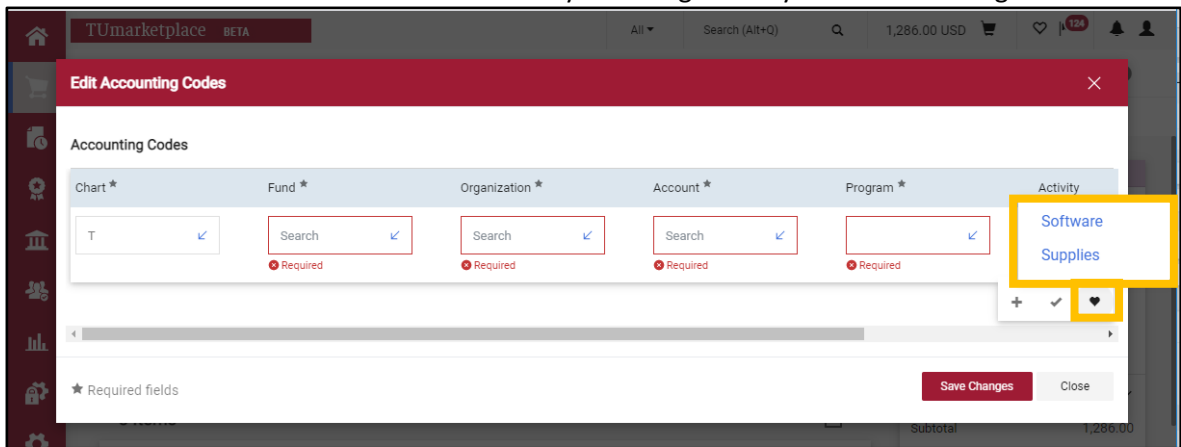
3.2.2. In the window that appears, click "Accounting Codes".



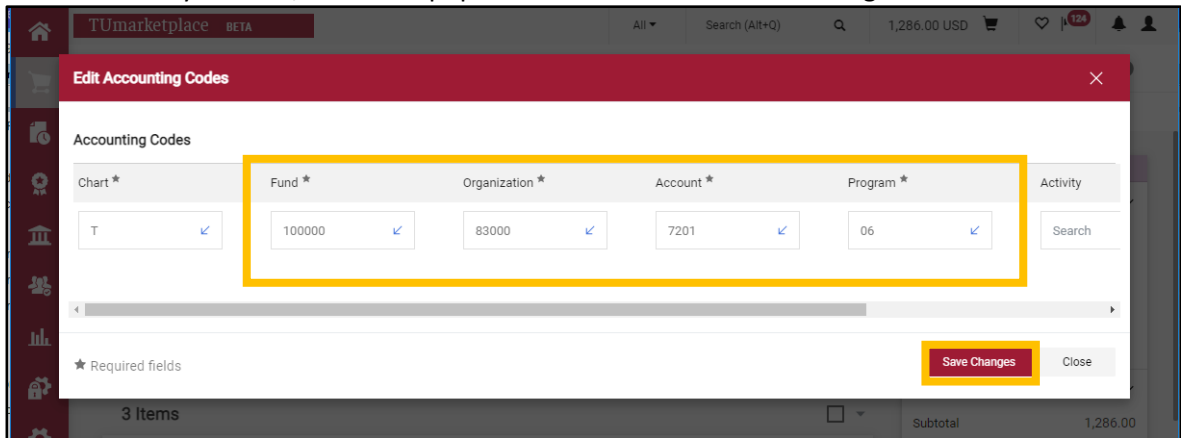
4. A window will appear where you can do one of the following.

4.1. If you have saved one or more favorite FOAPAL strings and you would like to use one of them:

4.1.1. Click on the heart icon. You will see the names you have given to your favorite strings.

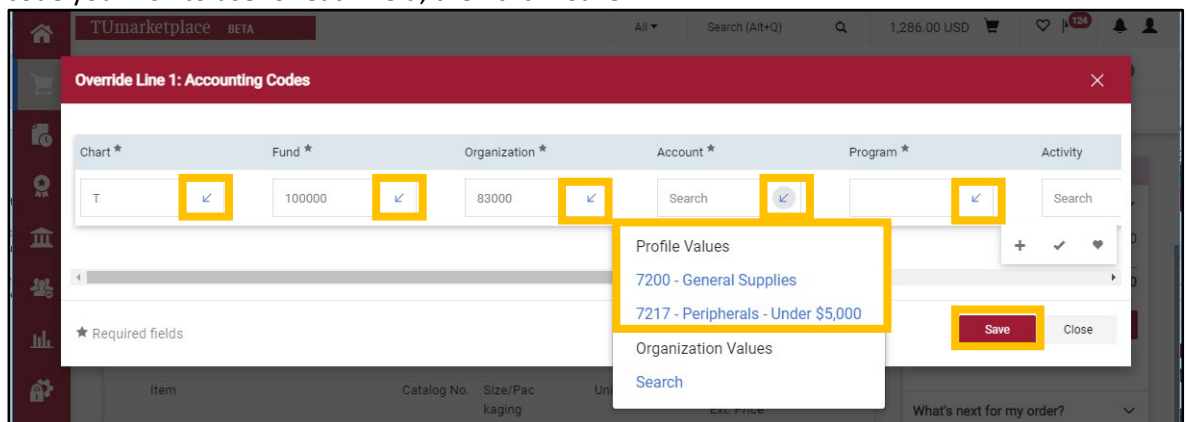


4.1.2. Select the one you want, and it will populate the fields. Click "Save Changes".



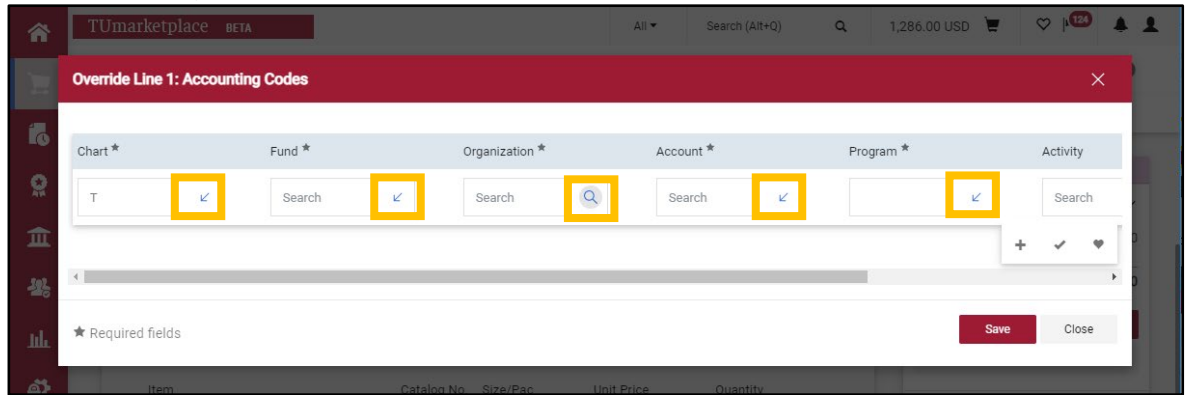
4.2. If you have added FOAPAL codes to your profile and you would like to use one of them:

4.2.1. Click the diagonal arrow in each field and the codes saved to your profile will appear. Choose the code you wish to use for each field, then click "Save".

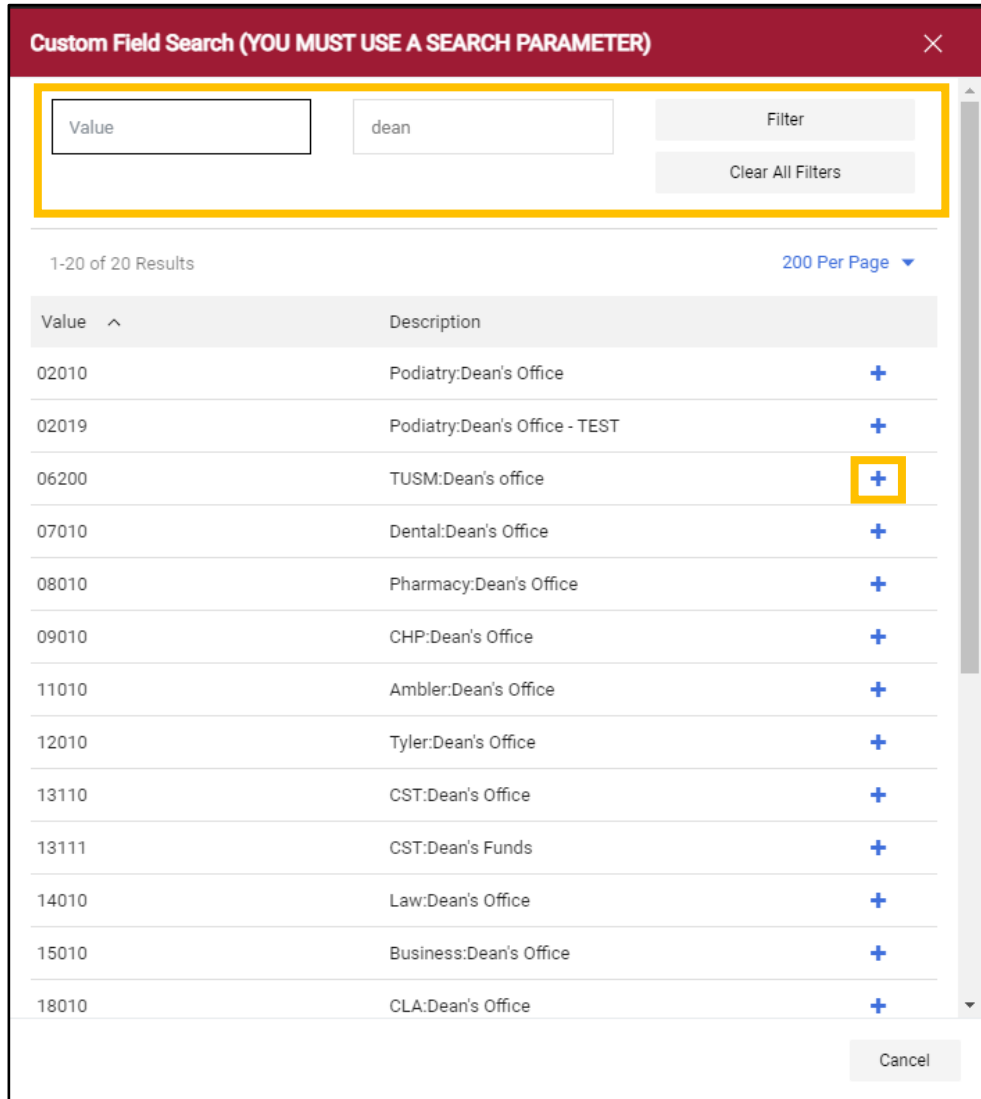


4.3. If you would have no saved favorite FOAPAL strings and have not saved any codes to your profile, or if you would like to look up values other than those you have saved:

- 4.3.1. Click on the symbol in the code field and a search window will appear. The symbol will be a magnifying glass if you have no saved codes, or it will be a diagonal arrow if you do. (Note: if you see a diagonal arrow, you must click on the arrow and then on the “Search” link to navigate to the search window.)



- 4.3.2. In the search window, you can filter by code (in the value field) or by description. Once you have found the code you wish to use, click the plus icon. The window will close and the field will be populated with your chosen code.



4.3.3. Complete each of the FOAPAL fields and click “Save”.

Chart *	Fund *	Organization *	Account *	Program *	Activity
T	100000	06200	7217	02	Search

★ Required fields

Save Close

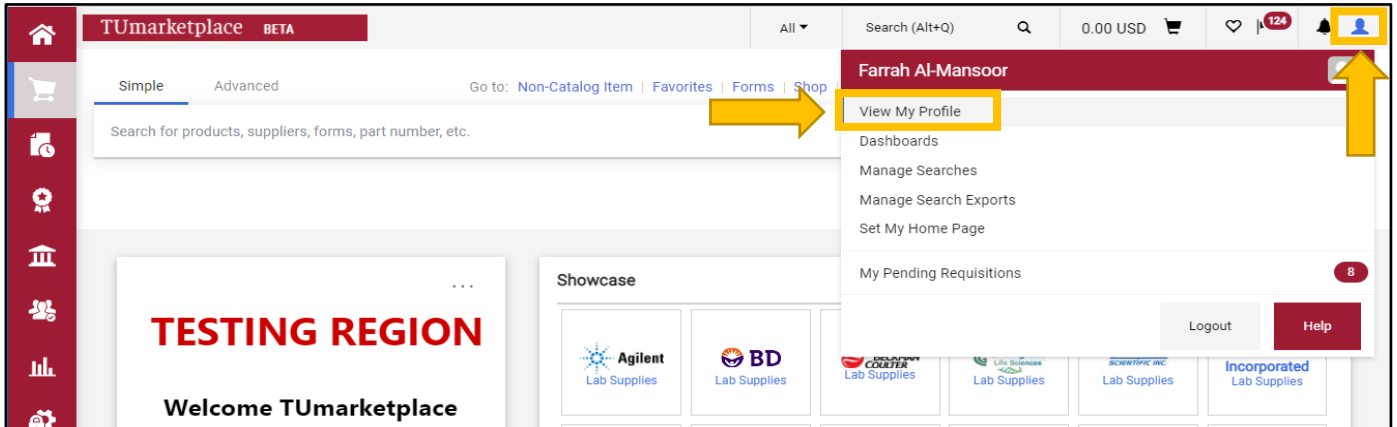
Note that you can also simply type in the FOAPAL codes if you know them, and then click “Save”.

5. Once you click “Save”, the Accounting Code window will close, and you can view your requisition summary again.

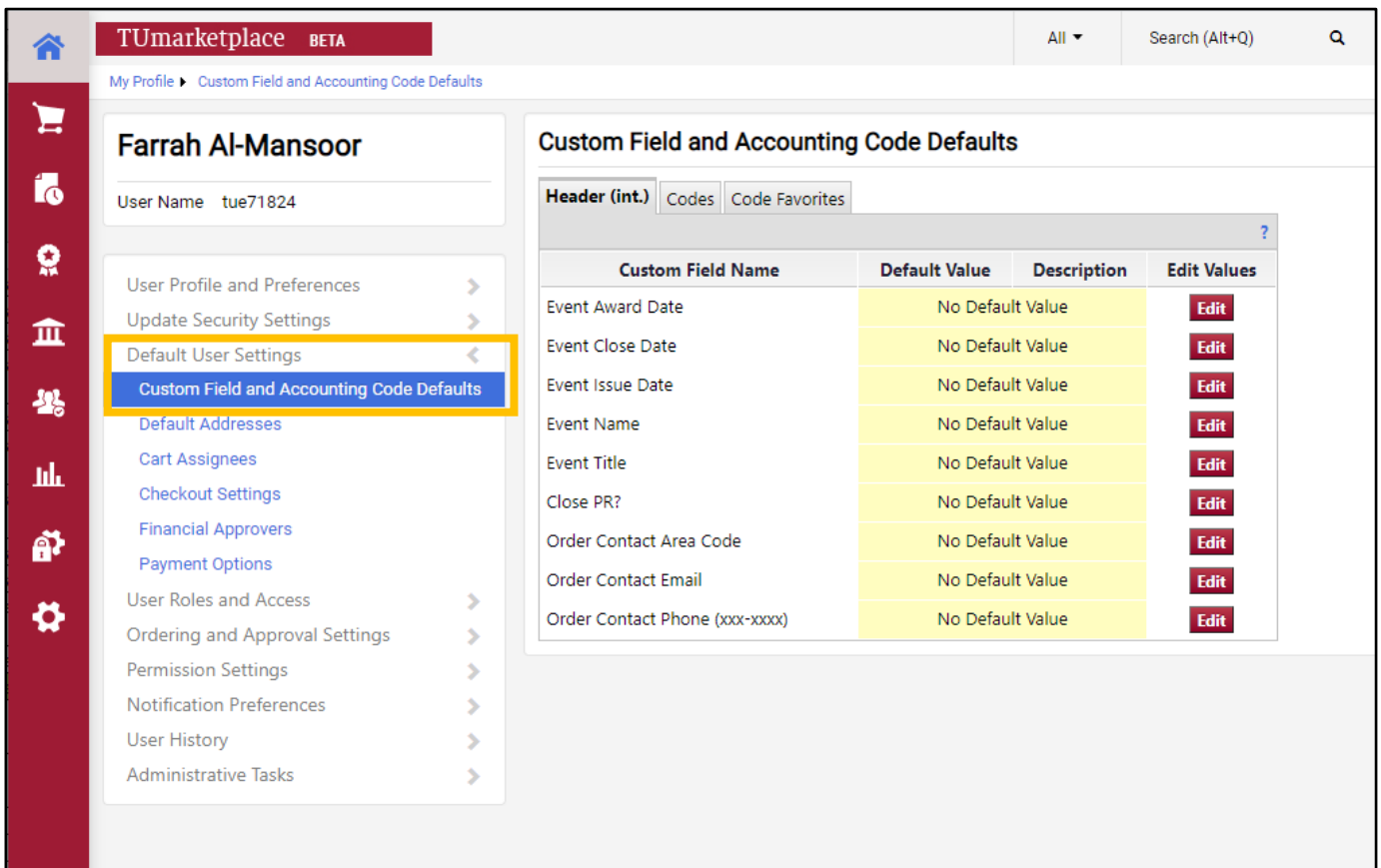
Setting your Default FOAPAL

Purpose: To make TUmarketplace transaction processing more efficient, FOAPAL codes can be entered and stored as defaults, eliminating the need to enter time with every transaction. This guide will demonstrate how to set your default FOAPAL codes.

1. Log into TUmarketplace.
2. Click on the user icon in the upper right-hand corner and choose "View My Profile" from the dropdown.



3. At the left side of the screen, in the "Default User Settings" section, click the "Custom Field and Accounting Code Defaults" link.



- Click on the “Codes” tab, which will show the fields you can set as defaults. **Note:** The Chart default value is already set to T – it is recommended that you do not change this value. Update each part of your FOAPAL defaults by clicking on the “Edit” button at the right side of the row corresponding to the code you wish to change.

Header (int.) **Codes** Code Favorites

Custom Field Name	Default Value	Description	Edit Values
Organization	No Default Value		Edit
Fund	100000	Operating Fund	Edit
Activity	No Default Value		Edit
Chart	T	Chart T	Edit
Program	No Default Value		Edit
Location	No Default Value		Edit
Account	7200	General Supplies	Edit
Buyer Name (for Purchasing Dept Only)	No Default Value		Edit
Send to Bid	No Default Value		Edit
Special Handling	No Default Value		Edit

- A screen will appear with a “Create New Value” button. Click on the button to enter your information.

Header (int.) **Codes** Code Favorites

Custom Field Name	Default Value	Description	Edit Values
Organization	No Default Value		Edit

Edit Values Close

Create New Value

Value	Description

* Custom Field Values marked with an asterisk are role-based values. Users can only modify the Default status of these Custom Field Values.

6. A “Search For Value” window will appear. Enter your code and click the “Search” button.

The screenshot shows the TUmarketplace interface for user Farrah Al-Mansoor. The main content area is titled "Custom Field and Accounting Code Defaults" and has tabs for "Header (int.)", "Codes", and "Code Favorites". A table lists custom field values for "Organization", with a "No Default Value" entry highlighted in yellow. An "Edit Values" window is open, showing a search form. The search form includes a "Field Name" dropdown set to "Organization", a "Value" input field containing "83000", a "Description" input field, and a "Results Per Page" dropdown set to "5". A "Search" button is highlighted in red. Below the search form, a note states: "* Custom Field Values marked with an asterisk are role-based values. Users can only modify the Default status of these Custom Field Values."

7. A window will appear with the corresponding description for your code. Make sure it is correct, then check the box to select it and click the “Add Values” button.

The screenshot shows the same TUmarketplace interface, but the search results are displayed. The "Edit Values" window now shows a "Results" section with "Values Found" set to "1" and "Page 1 of 1". A table lists the search results:

Select	Value	Description
<input checked="" type="checkbox"/>	83000	Purchasing Main

Below the table, there are "Add Values" and "Back to Search" buttons highlighted in red. The note about role-based values remains at the bottom of the window.

8. The code will appear in the box to the left – click it.

TUmarketplace BETA

My Profile > Custom Field and Accounting Code Defaults

Farrah Al-Mansoor
User Name tue71824

Custom Field and Accounting Code Defaults

Header (int.) **Codes** Code Favorites

Custom Field Name	Default Value	Description	Edit Values
Organization	No Default Value		Edit

Edit Values Close

Create New Value

Value	Description
83000	Purchasing Main

Search For Value (YOU MUST USE A SEARCH PARAMETER) ?

Field Name Organization

Value 83000

Description

Results Per Page 5

Search

No Results Found

* Custom Field Values marked with an asterisk are role-based values. Users can only modify the Default status of these Custom Field Values.

9. On the screen that appears, select the code by checking the “Default” checkbox, then click save.

TUmarketplace BETA

My Profile > Custom Field and Accounting Code Defaults

Farrah Al-Mansoor
User Name tue71824

Custom Field and Accounting Code Defaults

Header (int.) **Codes** Code Favorites

Custom Field Name	Default Value	Description	Edit Values
Organization	No Default Value		Edit

Edit Values Close

Create New Value

Value	Description
83000	Purchasing Main

Edit Existing Value

Value 83000

Description Purchasing Main

Default

Status active

Save Remove

* Custom Field Values marked with an asterisk are role-based values. Users can only modify the Default status of these Custom Field Values.

- A "Success" pop-up will appear once you have set the code as your default. Click "Close" to return to the list of code fields.

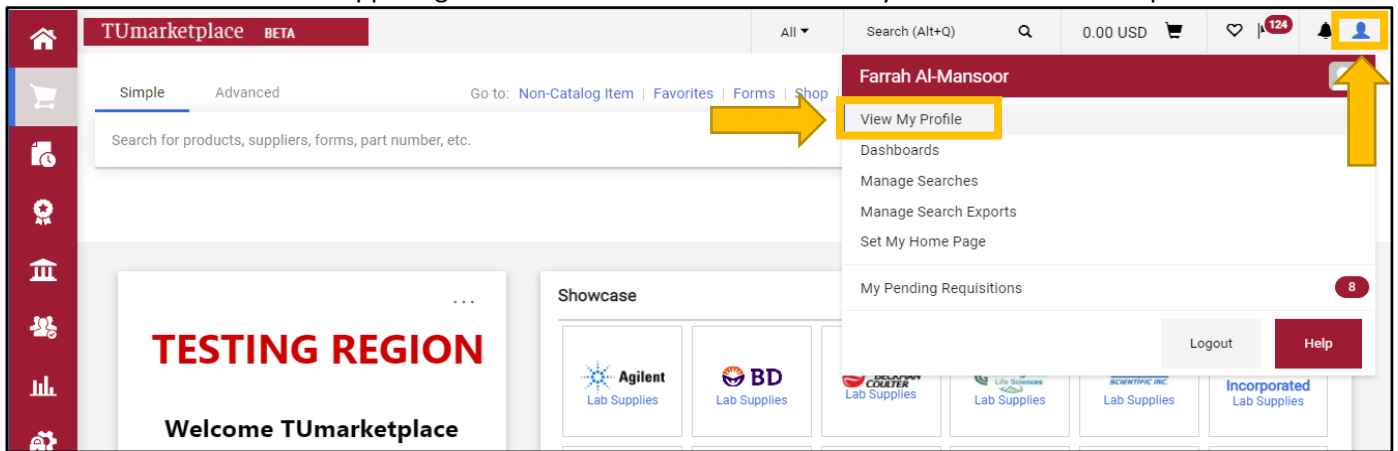
The screenshot displays the TUmarketplace interface for user Farrah Al-Mansoor. The page title is "Custom Field and Accounting Code Defaults". A success message "Success Successfully Saved Changes" is shown in a green box at the top right. The main content area shows a table with columns: Custom Field Name, Default Value, Description, and Edit Values. The table contains one row: Organization, 83000, Purchasing Main, and an Edit button. Below the table, there is a "Create New Value" section with a table for adding new values. An "Edit Existing Value" modal is open, showing the details for the selected value: Value (83000), Description (Purchasing Main), Default (checked), and Status (active). There are Save and Remove buttons at the bottom of the modal. A note at the bottom states: "* Custom Field Values marked with an asterisk are role-based values. Users can only modify the Default status of these Custom Field Values."

- Follow the same steps to create defaults for the other parts of your FOAPAL. Note that for some, such as Fund or Program, you may enter more than one code. Setting these up now will allow you to switch between FOAPALs as needed in future orders.

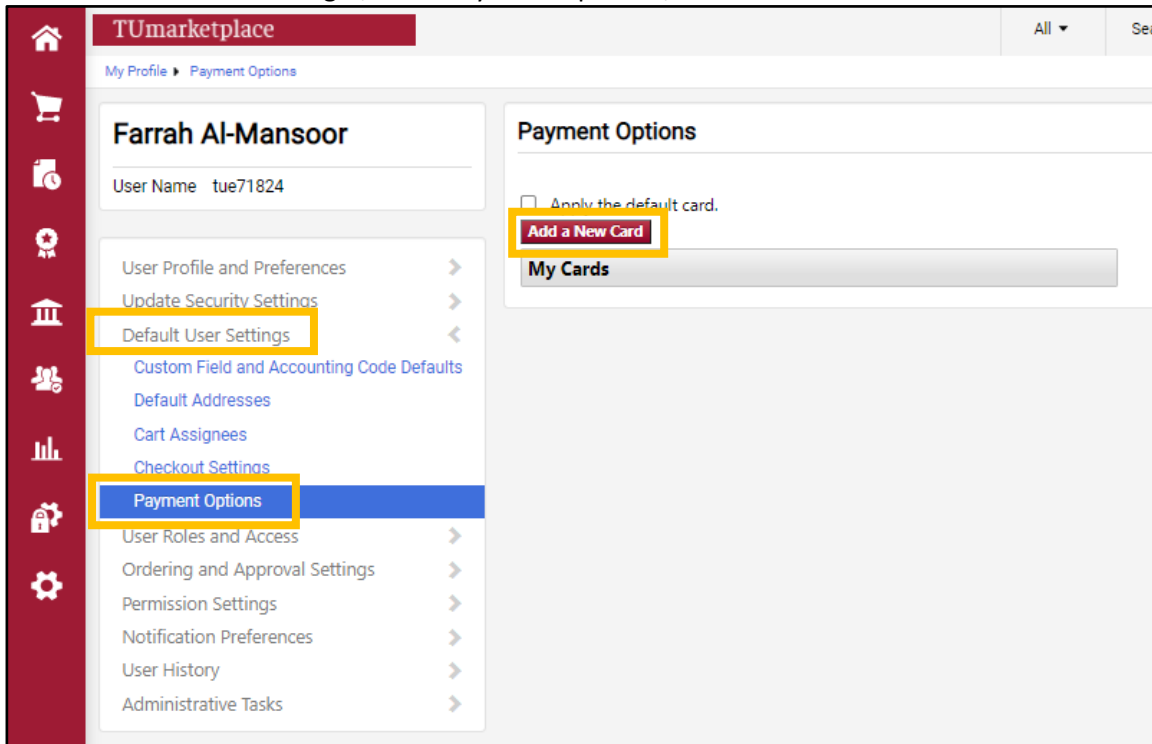
Using Your Temple Purchasing Card in TUmarketplace

Purpose: This guide will demonstrate how to utilize you Temple Purchasing Card (TPC or Pcard) within TUmarketplace. Note that, at this time, only select suppliers are set up to receive TPC purchases. Purchasing Services will add suppliers to the TPC program as they become available.

1. Log in to TUmarketplace.
2. Click on the user icon in the upper right-hand corner and choose “View My Profile” from the dropdown.



3. Under “Default User Settings”, click “Payment Options”, then on “Add a New Card”.



4. Fill out the card details as described below, then click “Save” to add the card to your profile.
 - 4.1. Give the card a nickname.
 - 4.2. Enter the cardholder name.
 - 4.3. Enter the card number.
 - 4.4. Enter the expiration date.
 - 4.5. If you would like the card to appear each time you make a purchase, check the “Default card” box.

Payment Options

Apply the default card.

Add a New Card

My Cards

Card Details

Name this card (e.g. My Visa)

Cardholder Name

Card Number

Expiration Date

Default card

Save

5. To make a purchase using your Pcard, Create your TUmarketplace shopping cart as you normally would.
 - 5.1. When you get to the Final Review screen, you will see the Pcard box available if this vendor is eligible for TPC purchases. If you are going to purchase with the TPC, click the pencil icon.

General

Cart Name: 2021-07-02.tue71824 01

Description: no value

Priority: Normal

Prepared by: Farrah Al-Mansoor

Prepared for: Farrah Al-Mansoor

Shipping

Ship To

Room/Floor/Attn 317/3rd Fl/Farrah Al-Mansoor
 Department Purchasing
 Liacouras Walk - 038
 1938 Liacouras Walk
 PHILADELPHIA, PA 19122
 United States

If you are a Reviewer, enter your information here to be contacted with order status information.

Order Contact Area Code (xxx) no value

Order Contact Phone (xxx-xxxx) no value

Order Contact Email no value

Delivery Options

Ship Via: Best Carrier-Best Way

Billing

Bill To

Accounts Payable
 215-926-2048
 1852 N. 10th Street (083-11)
 Philadelphia, PA 19122
 United States

Billing Options

Accounting Date: no value

AP Controls Name (for AP Only) no value

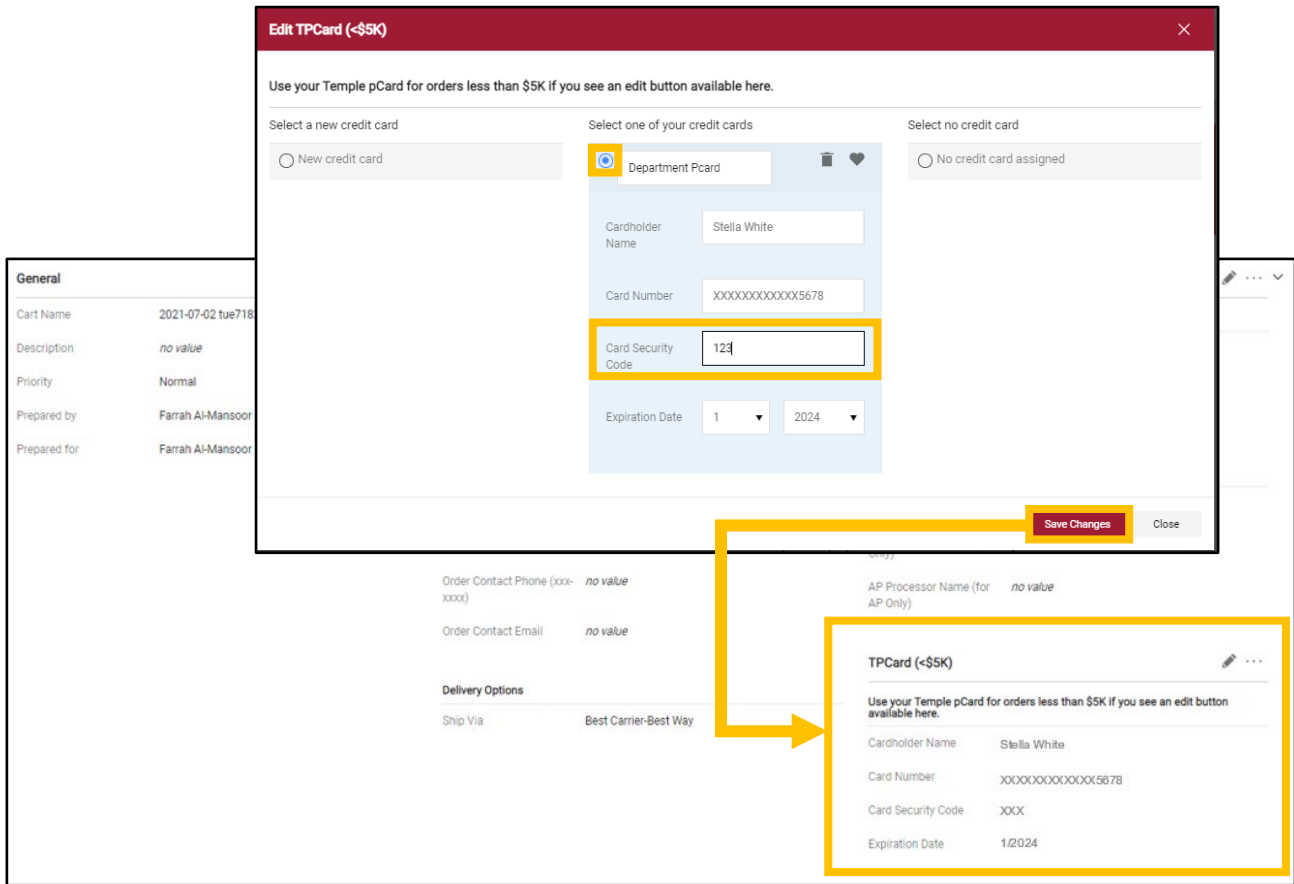
AP Processor Name (for AP Only) no value

TPCard (<\$5K)

Use your Temple pCard for orders less than \$5K if you see an edit button available here.

No credit card has been assigned.

5.2. The “Edit TPCard” window will appear. Select the card and enter its security code – that will not feed in from your defaults. Click “save” and the card will appear on the draft requisition.



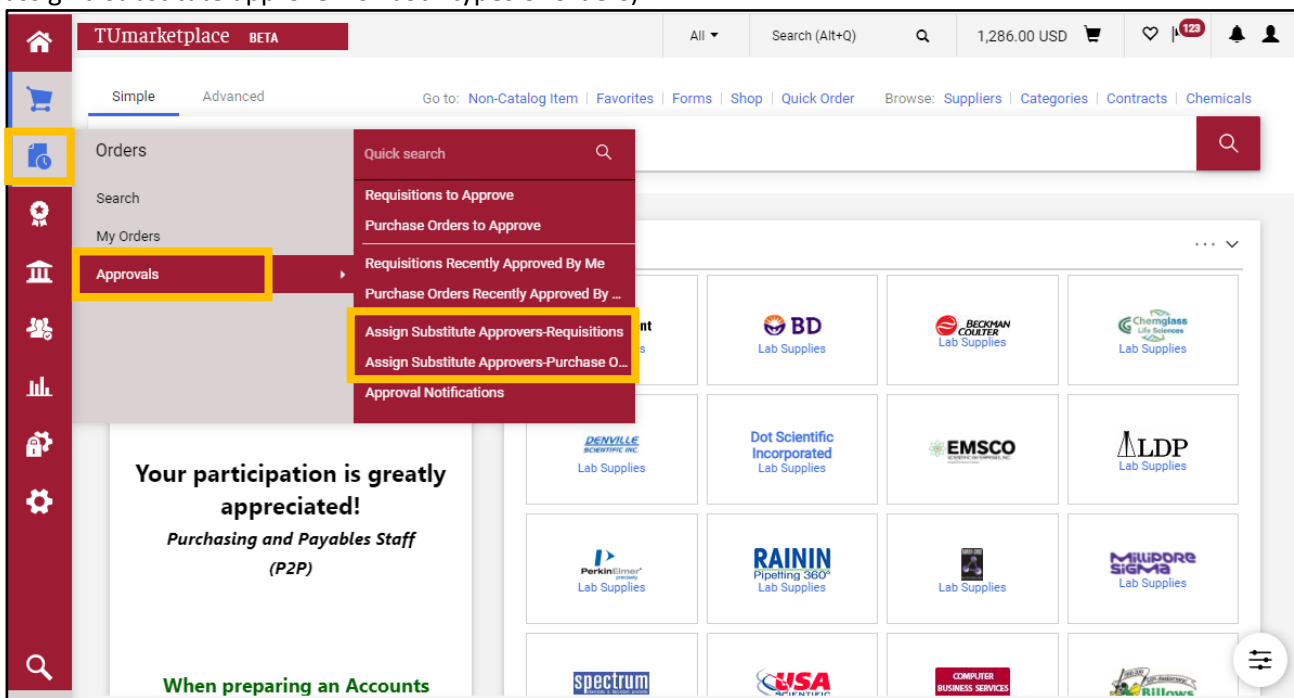
Note: TUmarketplace orders that are placed via the TPC will have a Purchase Order number that starts with the letters AX.

Setting up Your Substitute Approver in TUmarketplace

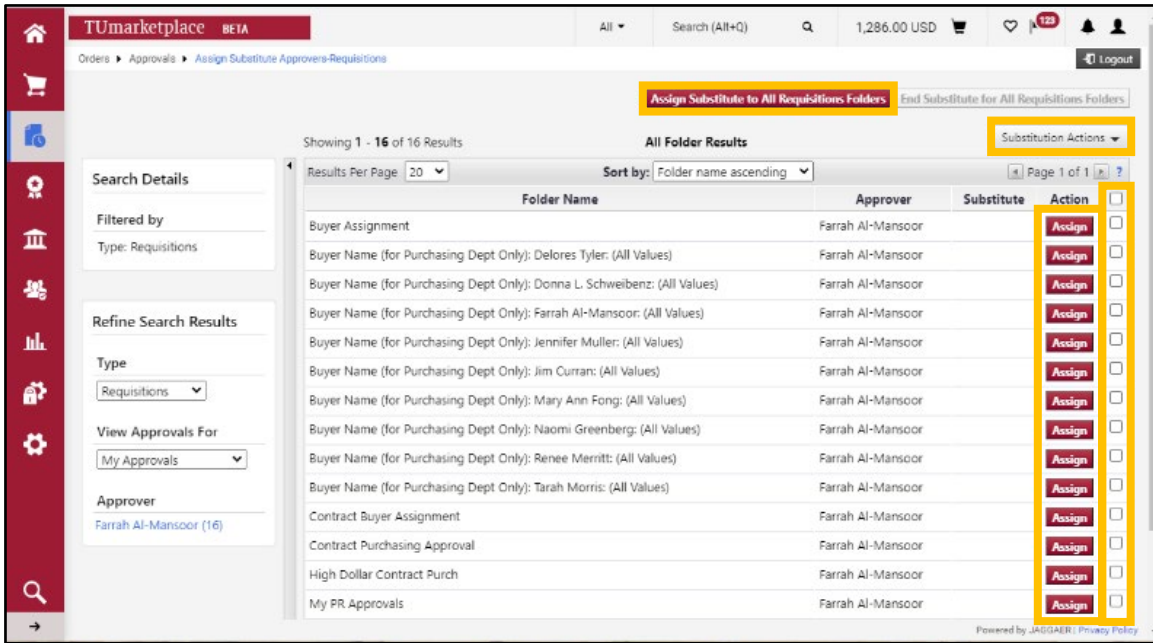
Purpose: If you are an approver in TUmarketplace and plan to be on vacation or are otherwise unable to approve your requisitions for a period of time, you have the option of selecting a substitute approver to ensure that the requisition workflow approval process will not be delayed in your absence. This guide will demonstrate the process of assigning and terminating a substitute approver.

Note: Your substitute approver must have signature authorization for the relevant FOAPALs that is at the same or a higher level than you.

1. Log in to TUmarketplace.
2. Hover over the Orders icon at the left of the screen, then hover over “Approvals”. Click on “Assign Substitute Approvers-Requisitions” or on “Assign Substitute Approvers-Purchase Orders” depending on which you wish to do (note that the process is the same for both, and that you must go through the process for each if you wish to assign a substitute approver for both types of orders).

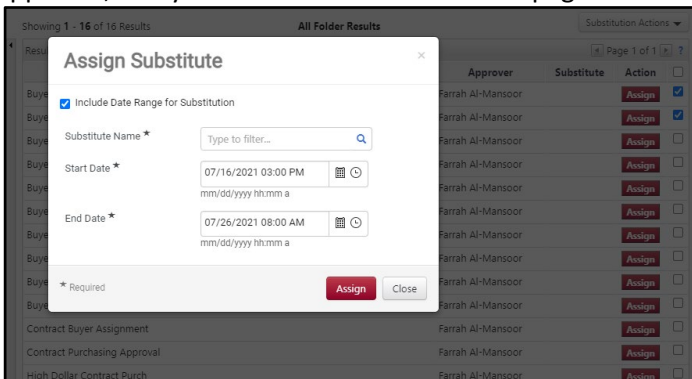


3. When assigning substitute folders, you can assign one, some, or all of your folders to another user.
 - a. To assign one folder: Click the “Assign” button next to the folder.
 - b. To assign multiple folders:
 - Place a check in each of the folders for which you would like to assign a substitute approver.
 - Click on “Substitute Actions”.
 - Select “Assign Substitute to Selected Folders”.
 - c. To assign all folders, you can click the “Assign Substitute to All Folders” button.

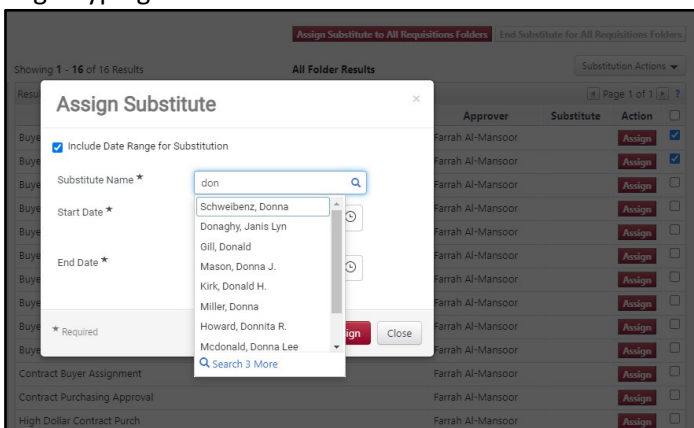


4. An “Assign Substitute” pop-up window will appear.

4.1. To set the substitute approver for a specific date range, check “Include Date Range for Substitution” and enter the appropriate dates. Note that you can click on the calendar icon to select a date, and the clock icon to select a time. (If you do not select this option, the selected individual will be immediately set as the approver, and you will need to return to this page to manually remove the substitute approver later).



4.2. Begin typing the substitute’s name in the “Substitute Name” box and select them from the dropdown field.



4.3. Click “Assign”.

5. The substitute’s name (and date range if you entered one) will appear in the “Substitute” column for the selected folder(s).

Showing 1 - 16 of 16 Results **All Folder Results** Substitution Actions ▾

Results Per Page: 20 Sort by: Folder name ascending Page 1 of 1 ?

Folder Name	Approver	Substitute	Action
Buyer Assignment	Farrah Al-Mansoor	Janis Lyn Donaghy Start Date: 07/16/2021 3:30 PM → End Date: 07/26/2021 8:00 AM	Remove <input type="checkbox"/>
Buyer Name (for Purchasing Dept Only): Delores Tyler: (All Values)	Farrah Al-Mansoor	Janis Lyn Donaghy Start Date: 07/16/2021 3:30 PM → End Date: 07/26/2021 8:00 AM	Remove <input type="checkbox"/>
Buyer Name (for Purchasing Dept Only): Donna L. Schweibenz: (All Values)	Farrah Al-Mansoor		Assign <input type="checkbox"/>
Buyer Name (for Purchasing Dept Only): Farrah Al-Mansoor: (All Values)	Farrah Al-Mansoor		Assign <input type="checkbox"/>
Buyer Name (for Purchasing Dept Only): Jennifer Muller: (All Values)	Farrah Al-Mansoor		Assign <input type="checkbox"/>
Buyer Name (for Purchasing Dept Only): Jim Curran: (All Values)	Farrah Al-Mansoor		Assign <input type="checkbox"/>
Buyer Name (for Purchasing Dept Only): Mary Ann Fong: (All Values)	Farrah Al-Mansoor		Assign <input type="checkbox"/>
Buyer Name (for Purchasing Dept Only): Naomi Greenberg: (All Values)	Farrah Al-Mansoor		Assign <input type="checkbox"/>
Buyer Name (for Purchasing Dept Only): Renee Merritt: (All Values)	Farrah Al-Mansoor		Assign <input type="checkbox"/>

6. To unassign your substitute approver, do one of the following:
 - a. To unassign one folder: Click on the “Remove” button next to their name.
 - b. To unassign multiple folders: Check the boxes, click the “Substitution Actions” button, and select “Remove Substitute from Selected Folders”.

Showing 1 - 16 of 16 Results **All Folder Results** Substitution Actions ▾

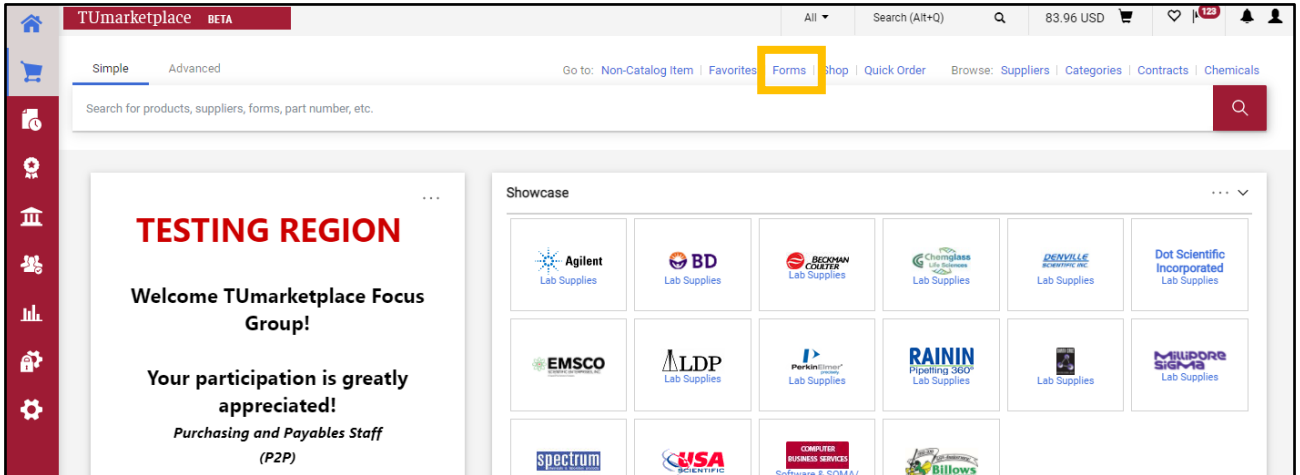
Results Per Page: 20 Sort by: Folder name ascending Page 1 of 1 ?

Folder Name	Approver	Substitute	Action
Buyer Assignment	Farrah Al-Mansoor	Janis Lyn Donaghy Start Date: 07/16/2021 3:30 PM → End Date: 07/26/2021 8:00 AM	Remove <input type="checkbox"/>
Buyer Name (for Purchasing Dept Only): Delores Tyler: (All Values)	Farrah Al-Mansoor	Janis Lyn Donaghy Start Date: 07/16/2021 3:30 PM → End Date: 07/26/2021 8:00 AM	Remove <input type="checkbox"/>
Buyer Name (for Purchasing Dept Only): Donna L. Schweibenz: (All Values)	Farrah Al-Mansoor		Assign <input type="checkbox"/>
Buyer Name (for Purchasing Dept Only): Farrah Al-Mansoor: (All Values)	Farrah Al-Mansoor		Assign <input type="checkbox"/>
Buyer Name (for Purchasing Dept Only): Jennifer Muller: (All Values)	Farrah Al-Mansoor		Assign <input type="checkbox"/>
Buyer Name (for Purchasing Dept Only): Jim Curran: (All Values)	Farrah Al-Mansoor		Assign <input type="checkbox"/>
Buyer Name (for Purchasing Dept Only): Mary Ann Fong: (All Values)	Farrah Al-Mansoor		Assign <input type="checkbox"/>
Buyer Name (for Purchasing Dept Only): Naomi Greenberg: (All Values)	Farrah Al-Mansoor		Assign <input type="checkbox"/>
Buyer Name (for Purchasing Dept Only): Renee Merritt: (All Values)	Farrah Al-Mansoor		Assign <input type="checkbox"/>

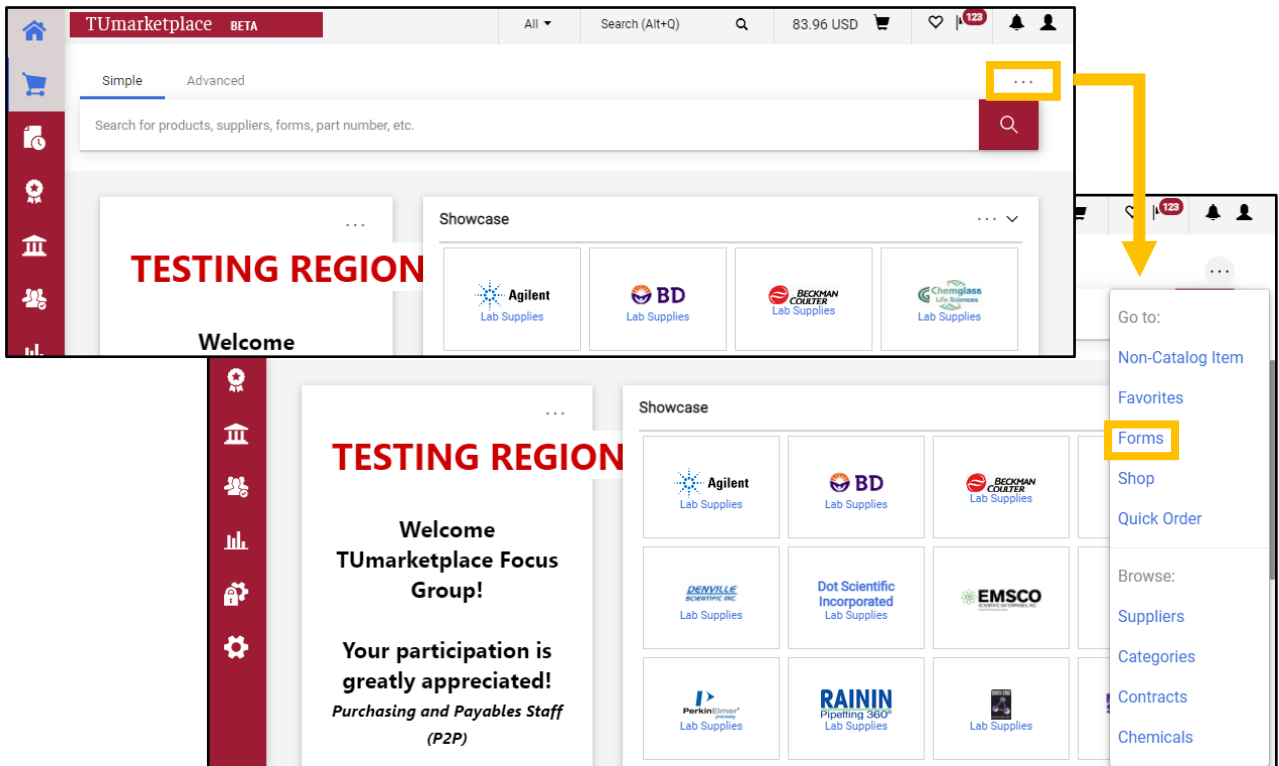
Placing a Change Order

Purpose: A change order is a document that sets out changes to a previously negotiated agreement or purchase order. This guide will show you how to complete a change order.

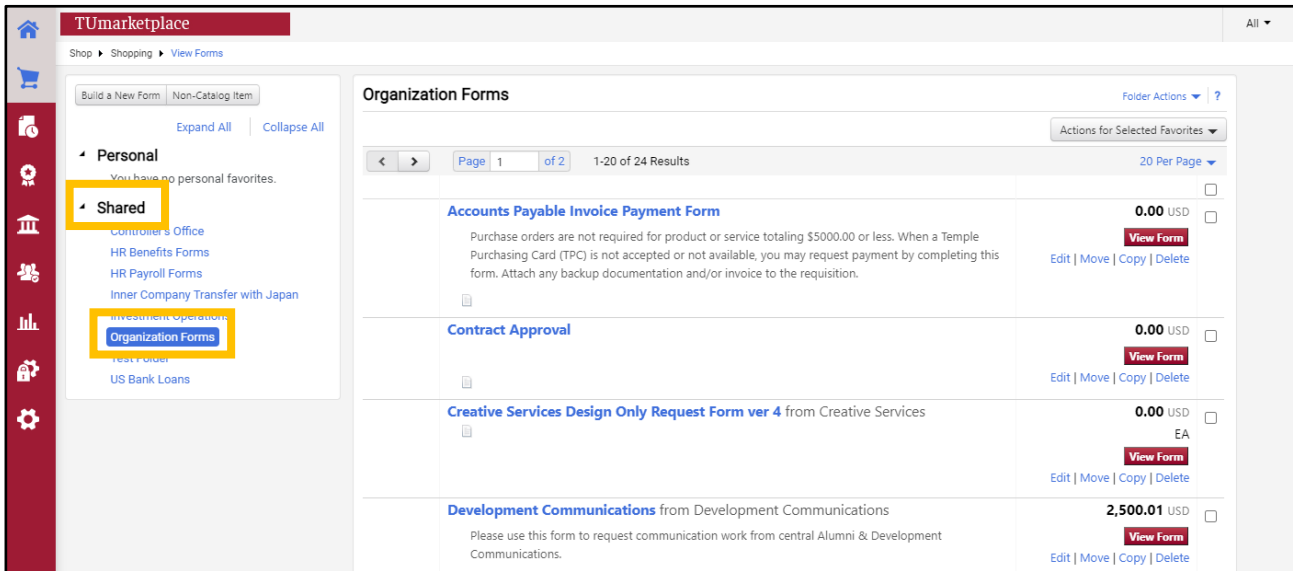
1. Log in to TUmarketplace.
2. Click the “Forms” link.
 - a. If your window is wide enough, this will appear above the search bar.



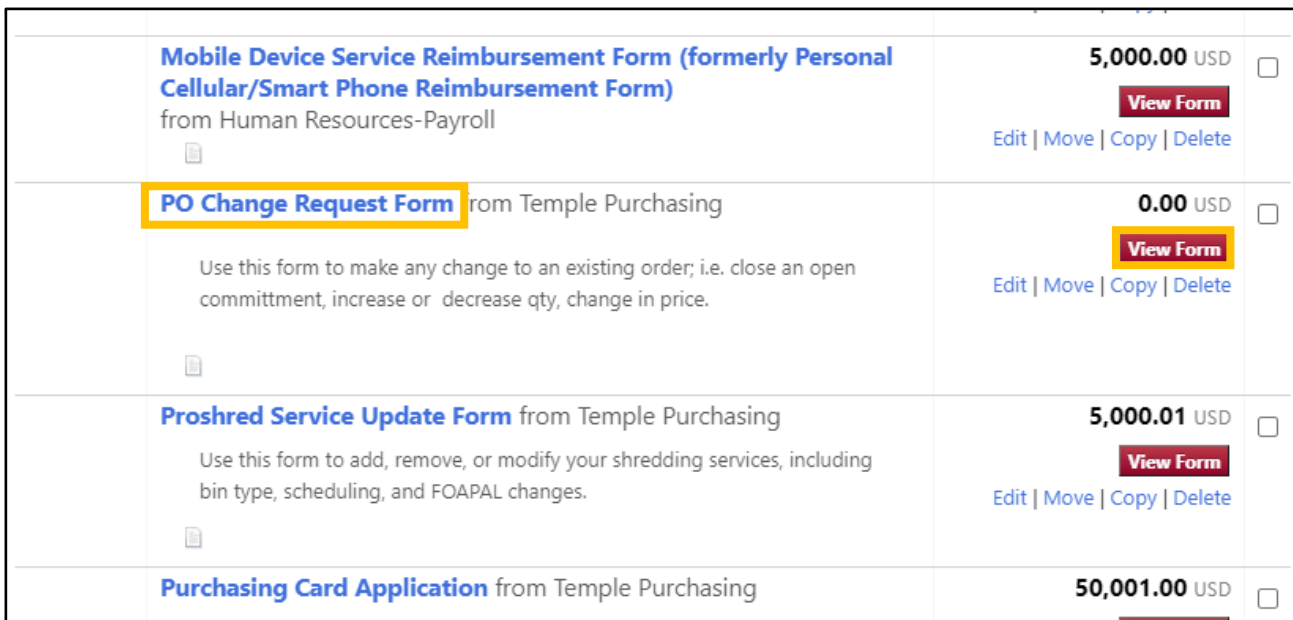
- b. If your window is too small, you must click the three dots above the search bar, and then click the “Forms” link.



- Navigate to the correct folder in the panel on the left of the screen: Under “Shared”, click “Organization Forms”.



- Find “PO Change Request Form” in the list of organization forms and click on the form name or the “View Form” button to open it.



- Complete the information for the Change Order as detailed below:
 - Enter the PO number.
 - Select the type of change you wish to make to the Purchase Order using the drop down menu.
 - Enter the new PO total.
 - Describe the reason for needing the change to the Purchase Order.
 - If you know the Buyer’s initials, you may enter them in that field.

PO Change Request Form
Available Actions: Add and go to Cart Go Close

PO Change Request Instructions ?

Use this form to request a change to a Purchase Order that has already been sent to the supplier.

In order to ensure proper handling of your request, you must do the following:

- Complete this form by providing as much detail as possible regarding the requested change.
- Enter the new PO Total if the change results in an increase in value. Enter the original PO total if this is a FOAPAL change only.
- Enter the original FOAPAL values or new FOAPAL values in the Accounting Codes section of the shopping cart. If multiple FOAPALS are required, please click "add split" in the shopping cart to include additional FOAPAL strings as required. This will ensure proper approval review routing of this change request.

This form will be routed through the FOAPAL review process and then to Purchasing for the completion of the change request. Contact the Temple Purchasing Department with any questions.

PO Change Request Details ?

Please complete the fields below to describe the nature of this PO Change Request. Provide as much information as possible on this form to avoid delays in processing. Fields in **bold** are required.

Vendor Name

PO Number

Type of change: Decrease PO Amount

Enter the new total cost of the reference PO. If the value of the PO has increased, enter the new total (original value + increase). If the change is to FOAPALS only, enter the original value of the PO. Temple Purchasing will not complete the change unless proper approval has been made for the new PO total.

New PO Total

Please describe the required PO change as well as justification for the change. Be specific in order to avoid any delays in processing. If there are changes to one or more lines on the PO, please include the line number and associated change for each.

PO Change Request Details

2000 characters remaining [expand](#) | [clear](#)

If known, enter the Buyer's initials from the PO.

Supplier Information ?

Supplier Temple Purchasing

Fulfillment Address Fulfillment Address 1:

Form Type Internal Change Request

Commodity Code [search...](#)

Total 0.00

6. Once the form is complete, select "Add and go to Cart" from the drop down at the top right of the window, click "Go", and you will be taken to your cart to complete the transaction.

Available Actions: Add and go to Cart Go Close

Add and go to Cart

Add to Cart and Return

Add to Cart

Add to Draft Cart or Pending PR/PO

Add to PO Revision

Add to Favorites

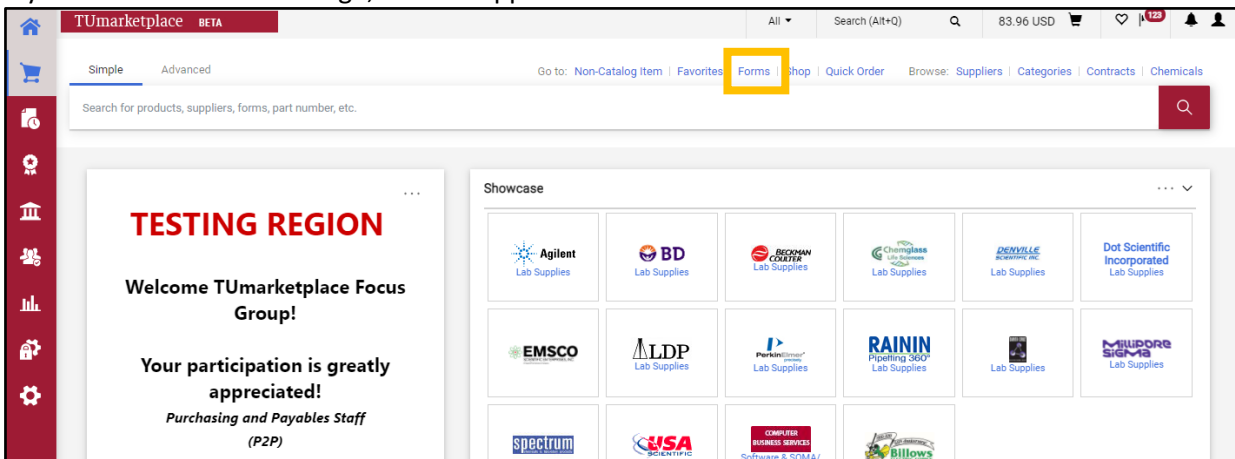
Save

Add to new Cart

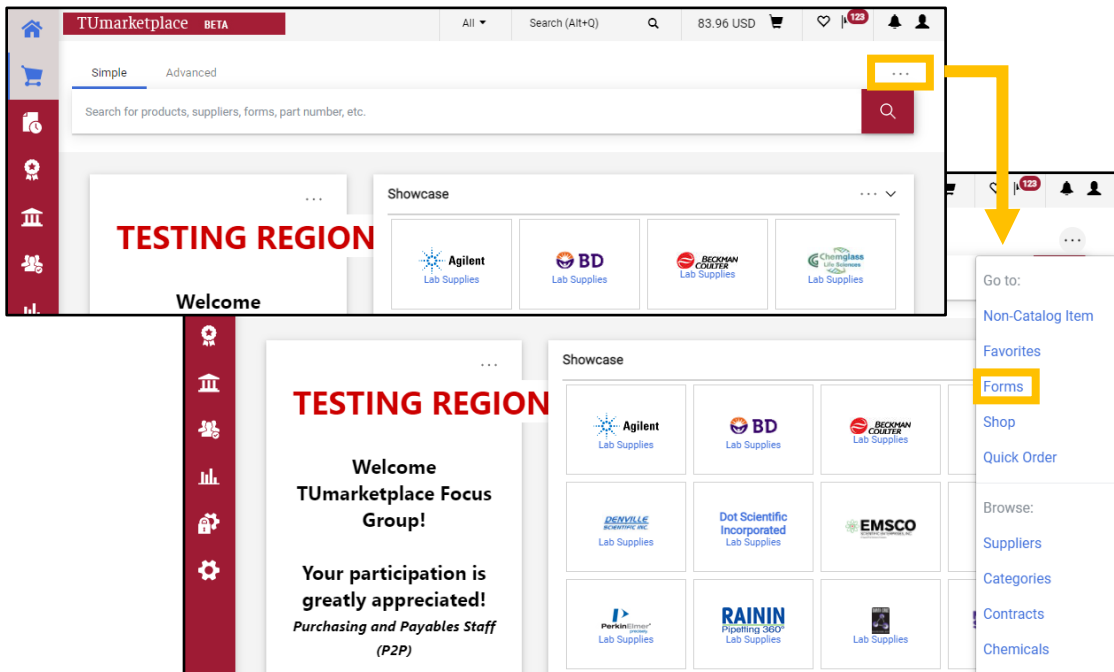
Placing a Blanket Purchase Order or Contract Manager Request

Purpose: Blanket Purchase Orders (BPOs) and Contract Manager (CM) both provide for easy ordering of non-catalog, repeat purchases from a single vendor. This guide will demonstrate how to request a blanket order or a contract in Contract Manager. Note: BPOs are being phased out in favor of CM.

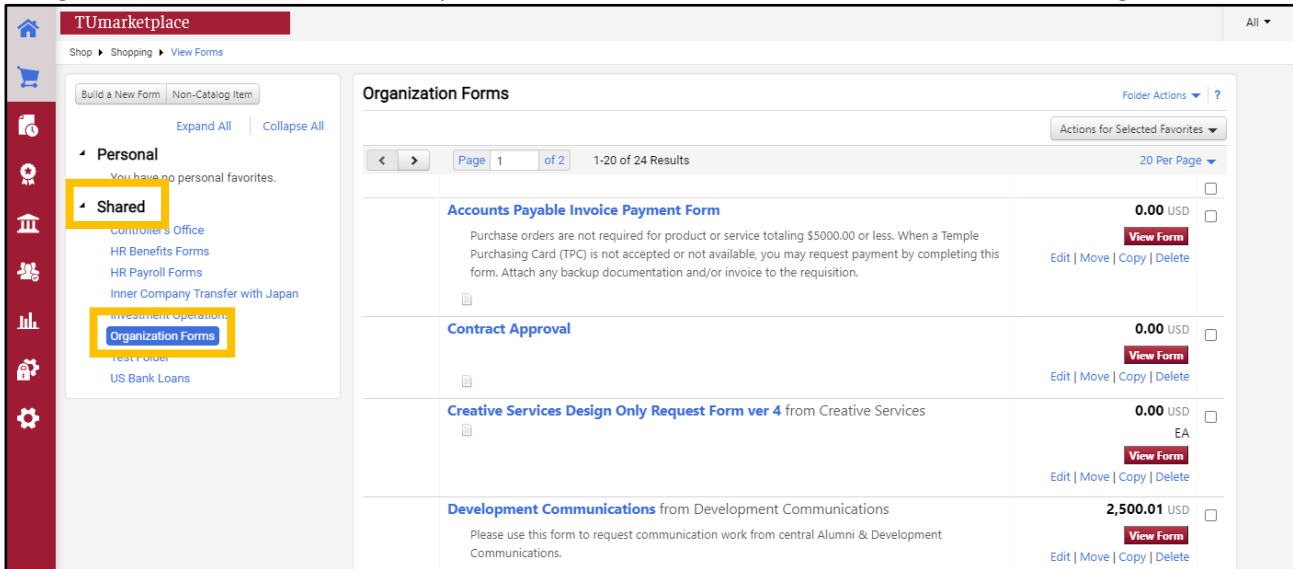
1. Log in to TUmarketplace:
2. Click the “Forms” link.
 - a. If your window is wide enough, this will appear above the search bar.



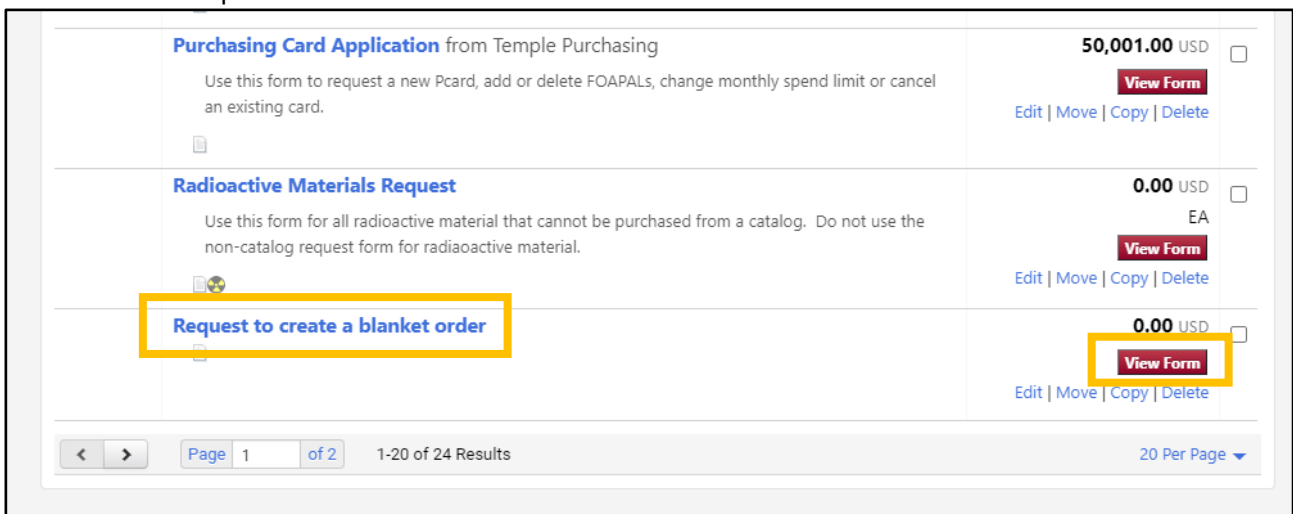
- b. If your window is too small, you must click the three dots above the search bar, and then click the “Forms” link.



- Navigate to the correct folder in the panel on the left of the screen: Under “Shared”, click “Organization Forms”.



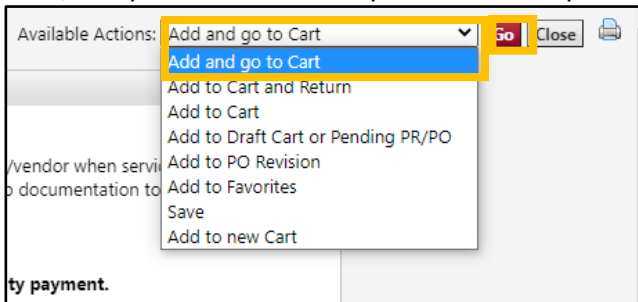
- Find “Request to create a blanket order” in the list of organization forms and click on the form name or the “View Form” button to open it.



- The form will open. Complete the information as detailed below.
 - In the “Product Description” field, enter the information regarding the product(s) or service(s) you will be procuring. If you are requesting a contract in Contract Manager, please be sure to indicate that in the product description field.
 - Use the “Additional Description” field for further detailed information of the product(s) or service(s).
 - The quantity will be defaulted to 1.
 - In the “Unit Price” field, enter the total amount of the blanket order for the time period it will be used or a budgetary amount for your contract. Please note there is a \$10,000 minimum for a blanket order.
 - Enter the start date and the end date; this may correspond to the fiscal year.

- If you know your supplier, enter it in the “Enter Supplier” field. If you need to search for the supplier, click the “Supplier Search” link. If the supplier is not in TUmarketplace, you may enter the information after clicking the “Enter Manually” link.
- Enter the commodity code. If you are unsure of the code, you may search for it by clicking the “search” link and entering a short description in the description box.

6. Once the form is complete, select “Add and go to Cart” from the drop down at the top right of the window, click “Go”, and you will be taken to your cart to complete the transaction.

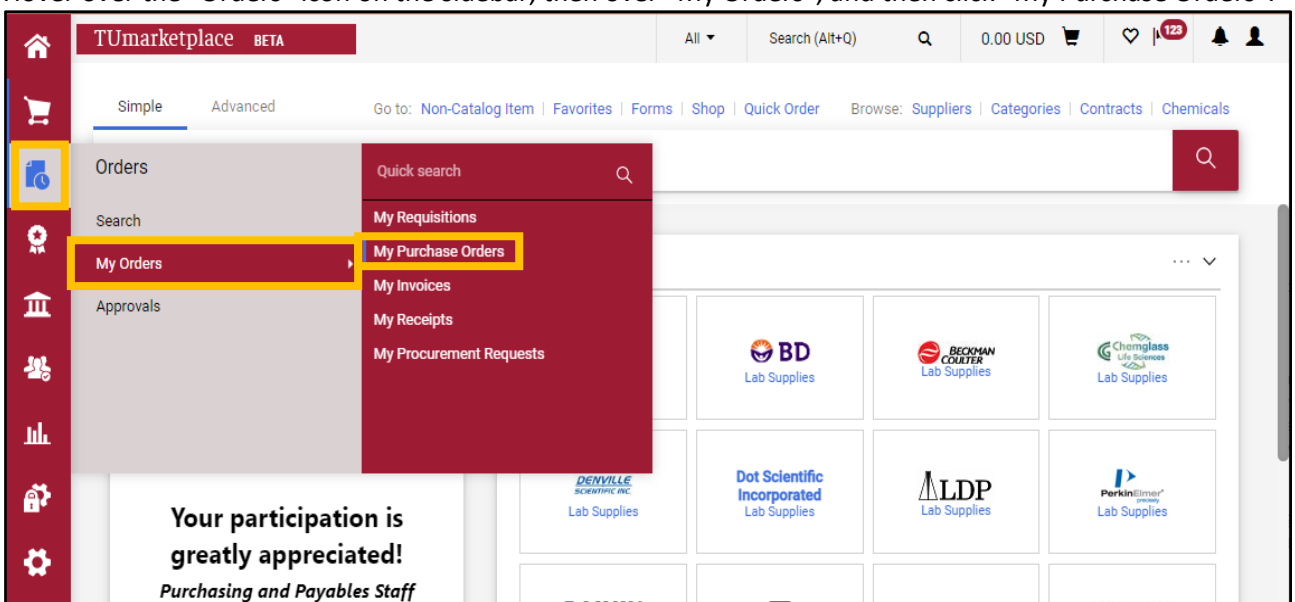


Please note: If you are requesting a contract in Contract Manager and you already have an agreement, please be sure to attach it to the requisition as an Internal Note.

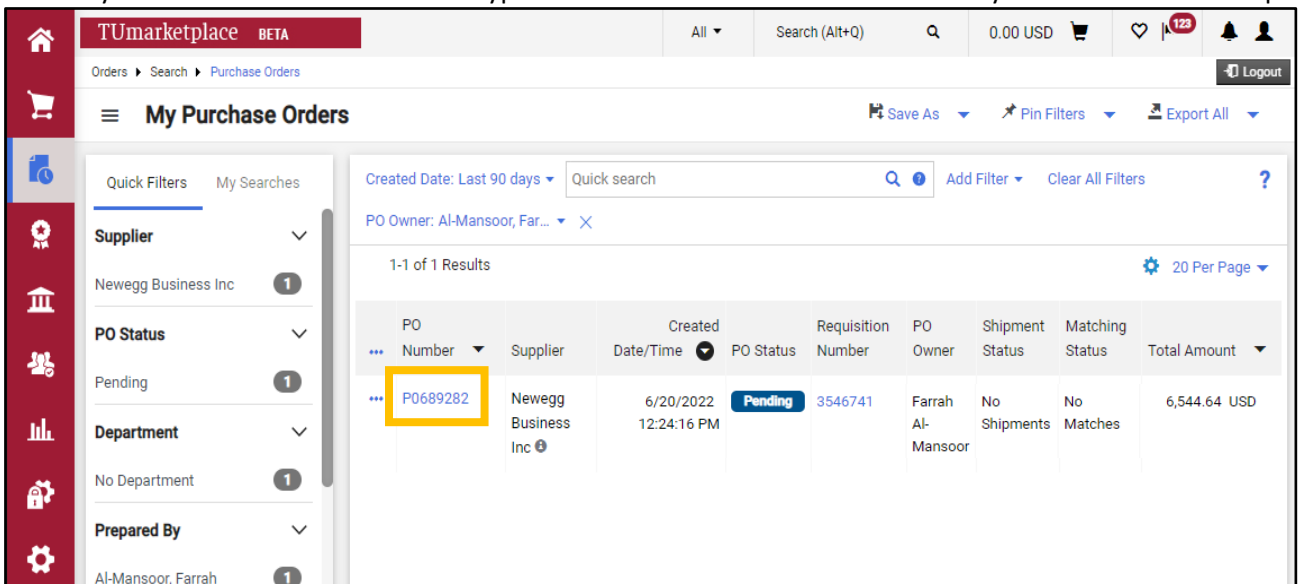
Adding Receipts/Receivers to Purchase Orders

Purpose: You must enter receipts (also known as receivers) for your POs that exceed \$5,000 – receipts inform Accounts Payable that the associated invoice can be paid. Partial receipts may be entered to allow partial payments. Two types of receipts can be created: quantity receipts, which are based on the number of items/services received; and cost receipts, which are based on the dollar value of the items/services received. Multiple receipts may be entered, to allow for partial payments as an order is fulfilled. However, it is important not to allow the total received for a given item/service to exceed the amount ordered – doing so will delay payment.

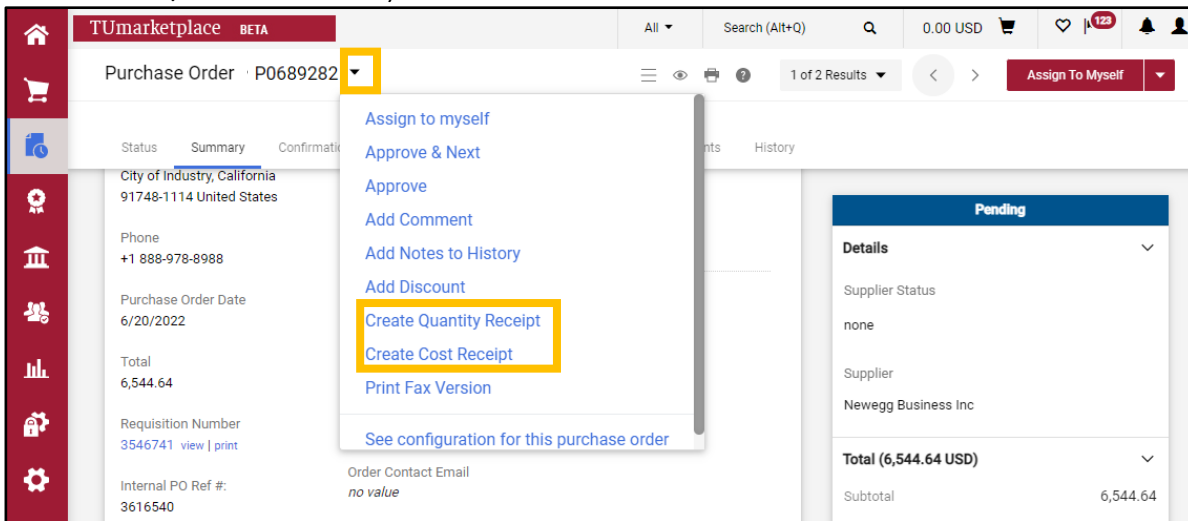
1. Log in to TUmarketplace.
2. Navigate to the PO by completing a search (see [Quick Search for a Requisition, Receipt, or Purchase Order](#)) or via the “My Orders” link:
 - 2.1. Hover over the “Orders” icon on the sidebar, then over “My Orders”, and then click “My Purchase Orders”.



- 2.2. A list of your POs will load. Click on the hyperlinked PO number of the PO to which you wish to add a receipt.

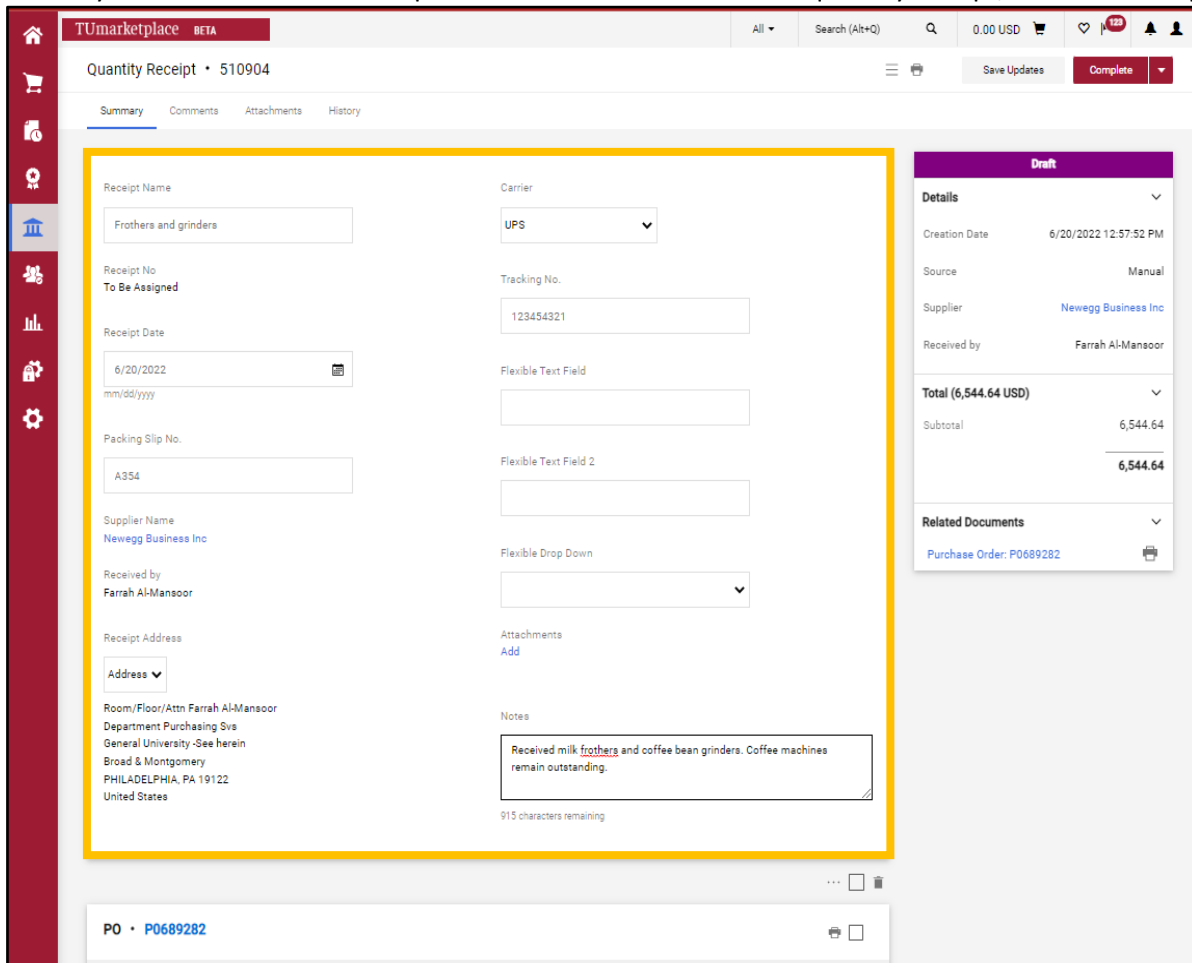


- On the Purchase Order page, hover over the downward-pointing black triangle next to the PO number. A list of possible actions will appear. Choose either “Create Quantity Receipt” (to enter a receipt based on the number of ordered items/services received) or “Create Cost Receipt” (to enter a receipt based on the dollar amount of the ordered items/services received).



- Create quantity receipt:** Clicking on “Create Quantity Receipt” in the previous step will open a Quantity Receipt page, listing out the items/services ordered and the quantity of each.

4.1. You may enter the information requested in the first section of the quantity receipt, but it is not required.



- 4.2. Enter the quantity received for each of the PO lines. Note that the default quantity for each PO line is the number ordered. Make sure not to enter a number greater than the number ordered – doing so will delay payment. You may also choose to enter a note for each PO line. Once you have entered the correct number received for each PO line, click “Complete” in the upper right corner.

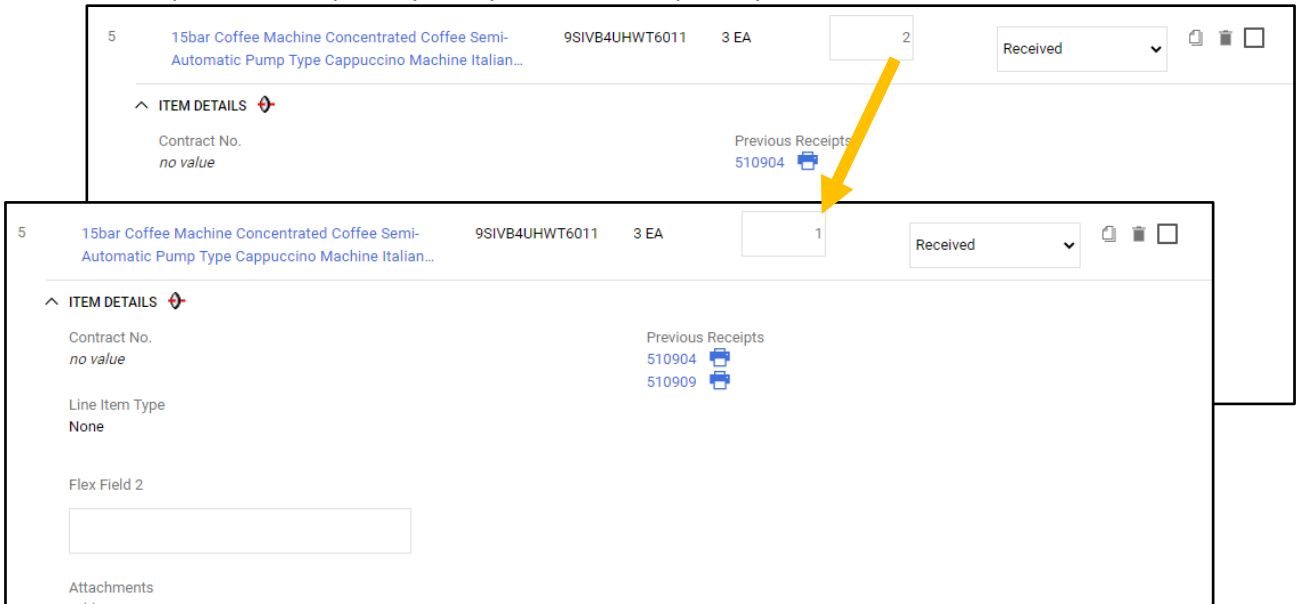
The screenshot displays the 'Quantity Receipt' form for PO 510904. The form is divided into three sections, one for each line item. Each section includes a table with columns for Line, Item, Catalog No., Quantity, and Status. The 'Quantity' field for each line is highlighted in yellow. Below each table is an 'ITEM DETAILS' section with fields for Contract No., Line Item Type, Flex Field 2, Attachments, and Notes. The 'Notes' field for each line is also highlighted in yellow. The 'Complete' button is visible in the top right corner.

Line	Item	Catalog No.	Quantity	Status
1	Nostalgia Electrics CLIT3PLSAQ Aqua Classic Retro 3-Quart Iced Tea & Coffee Brewing System With Plastic Pitcher	9B96-782-144	0	Received
2	BonJour Coffee & Tea Caffé Froth Monet Milk Frother	9SIV16A6798452	4	Received
3	Manual Coffee Bean Grinder With Ceramic Burrs Hand Crank Adjusting Grind Control Cafe Mill Machine For Kitchen	9SIVB4UHW76032	4	Received

- 4.3. You will be directed to a page confirming the creation of the receipt and noting the receipt number. The receipt indicates to Accounts Payable that they can proceed with payment for the portion of the order received once you have submitted the associated invoice.

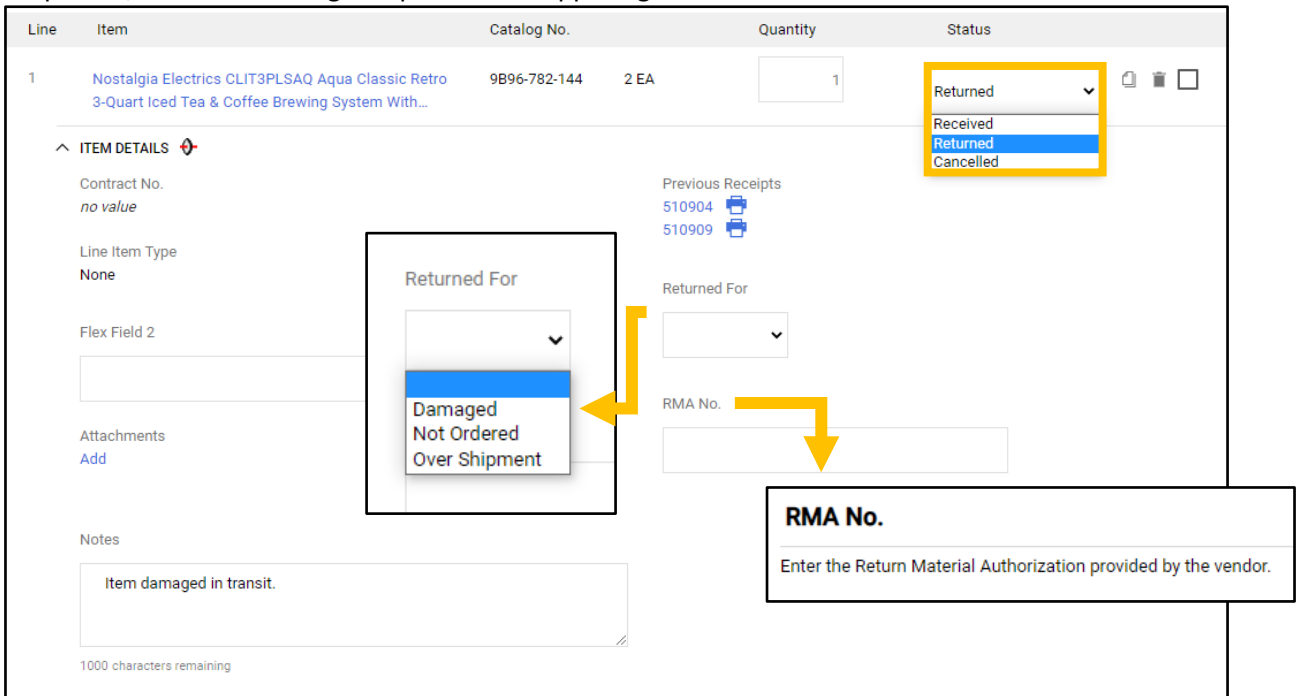
The screenshot displays the 'Receipt Created' confirmation page. The page features a green banner with a checkmark and the text 'Receipt Created'. Below the banner is a 'Summary' section with the receipt number 510904 and the PO number P0689282. The 'Next Steps' section includes links for 'Create Qty Receipt' and 'Create Cost Receipt'.

- 4.4. Note that the next quantity receipt you create for a PO will have a default quantity for each item/service equal to the difference between the quantity ordered and the quantity received on the previous receipt(s). E.g. if the PO was for three cappuccino machines and you entered a first receipt for two of those machines, the next time you create a quantity receipt, the default quantity will be one machine.



However, note that if you first created a **cost** receipt for the PO and then enter a **quantity** receipt, the default values on the quantity receipt will not account for the cost receipt. See the note at the end of this section for more information.

- 4.5. If applicable, you may enter the quantity of items/services returned or canceled by selecting from the status dropdown, and then clicking complete in the upper right corner.



5. Create cost receipt: Clicking on “Create Cost Receipt” in step 3 above will open a Cost Receipt page, listing out the items/services ordered and the total cost of each.

5.1. You may enter the information requested in the first section of the cost receipt, but it is not required.

Cost Receipt • 510911

Summary | Comments | Attachments | History

Receipt Name: Iced coffee maker x1

Carrier: FedEx

Receipt No To Be Assigned: [Empty]

Tracking No.: 256357246525dfg4525

Receipt Date: 6/20/2022

Packing Slip No.: 43

Supplier Name: Newegg Business Inc

Received by: Farrah Al-Mansoor

Receipt Address: Room/Floor/Attn Farrah Al-Mansoor, Department Purchasing Svs, General University-See herein, Broad & Montgomery, PHILADELPHIA, PA 19122, United States

Notes: Received 1 of 2 iced coffee makers.

Total (6,544.64 USD)

Subtotal: 6,544.64

Related Documents: Purchase Order: P0689282

5.2. Enter the dollar value received for each of the PO lines. Note that the default value for each PO line is the total cost of the item/service. Make sure not to enter a value greater than the value ordered – doing so will delay payment. You may also choose to enter a note for each PO line. Once you have entered the correct dollar value received for each PO line, click “Complete” in the upper right corner.

Cost Receipt • 510911

Summary | Comments | Attachments | History

Line	Item	Catalog No.	Cost	Status	
1	Nostalgia Electrics CLIT3PLSAQ Aqua Classic Retro 3-Quart Iced Tea & Coffee Brewing System With...	9B96-782-144	85.98	42.99	Cost Received
2	BonJour Coffee & Tea Caffé Froth Monet Milk Frother	9SIV16A6798452	160.48	0	Cost Received

ITEM DETAILS

Contract No. no value

Line Item Type None

Flex Field 2 [Empty]

Attachments Add

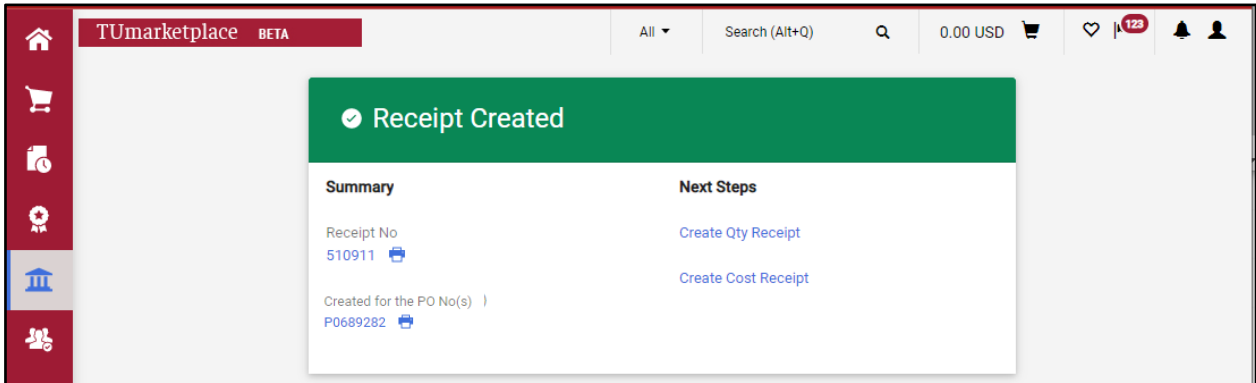
Notes: 1 of 2 iced coffee makers received.

Total (6,544.64 USD)

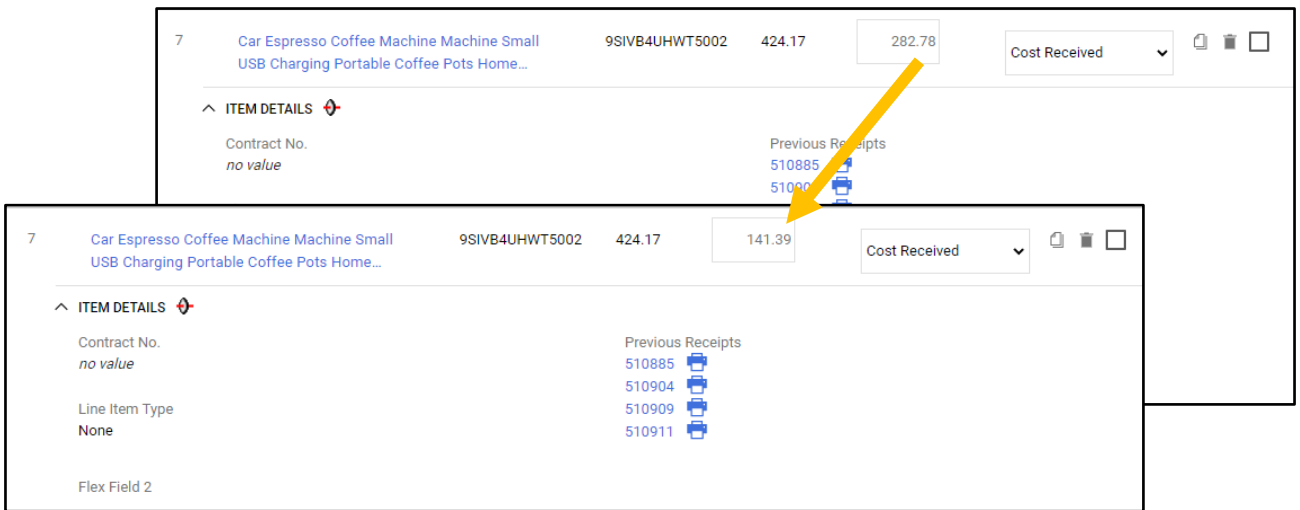
Subtotal: 6,544.64

Related Documents: Purchase Order: P0689282

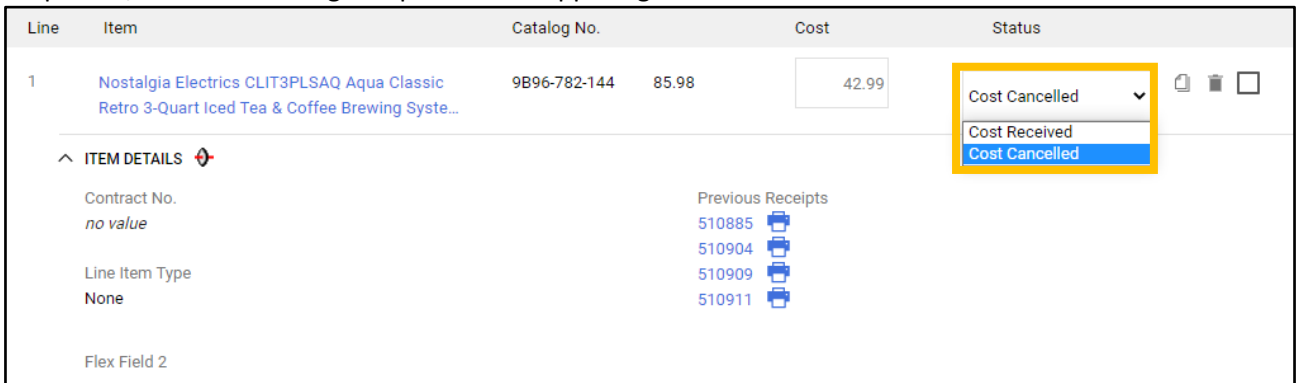
5.3. You will be directed to a page confirming the creation of the receipt and noting the receipt number. The receipt indicates to Accounts Payable that they can proceed with payment for the portion of the order received once you have submitted the associated invoice.



5.4. Note that the next cost receipt you create for a PO will have a default dollar value for each item/service equal to the difference between the value ordered and the value received on the previous receipt(s). E.g. if the PO was for two portable espresso machines at \$141.39 each and totaling to \$424.17, and you entered a first receipt for \$282.78, the next time you create a cost receipt, the default value will be the remaining \$141.39. However, note that if you first created a **quantity** receipt for the PO and then enter a **cost** receipt, the default values on the cost receipt will not account for the quantity receipt. See the note at the end of this section for more information.



5.5. If applicable, you may enter the dollar value of items/services canceled by selecting from the status dropdown, and then clicking complete in the upper right corner.



6. To see a list of the receipts created for a given PO, navigate to the PO page and click on the receipts tab.

The screenshot shows the TUmarketplace interface for a Purchase Order (PO) P0689282. The 'Receipts' tab is highlighted with a yellow box and a yellow arrow pointing to the 'Receipts' section of the page. The page displays a list of 4 receipts and detailed line items for various coffee and tea products.

Receipts Summary:

No.	Receipt Date	Receipt Type	Cost Amount	Received By
510911	6/28/2022	Cost	42.99 USD	Al-Mansoor, Fahah
510909	6/28/2022	Quantity	-	Al-Mansoor, Fahah
510904	6/28/2022	Quantity	-	Al-Mansoor, Fahah
510886	6/28/2022	Cost	382.78 USD	Al-Mansoor, Fahah

Line Details:

No.	Product Name	Catalog No.	Unit Price	Qty/UOM	Extended Price
1	Nostalgia Electrics CLT3PL5AQ Aqua Classic Retro 3-Quart Iced Tea & Coffee Brewing System With Plastic Pitcher	9896-782-144	42.99 USD	2 EA	85.98 USD
			Qty / Cost (In)	Qty / Cost (Out)	Status
			42.99 USD		Open Cost
			42.99 USD		Net Received
			2		Open
2	BonJour Coffee & Tea Caffè Froth Monet Milk Frother	9SIV1640798452	40.12 USD	4 EA	160.48 USD
			Qty / Cost (In)	Qty / Cost (Out)	Status
			160.48 USD		Open Cost
			4		Net Received
3	Manual Coffee Bean Grinder With Ceramic Burrs Hand Crank Adjusting Grind Control Cafe Mill Machine For Kitchen	9SIVB4UHWT6032	32.75 USD	4 EA	131.00 USD
			Qty / Cost (In)	Qty / Cost (Out)	Status
			131.00 USD		Open Cost
			4		Net Received
4	Xeoleo Stainless steel Espresso Coffee maker Automatic Coffee machine 15 Bar Pump Espresso machine pressure.	9SIVB4UHWT6121	949.80 USD	1 EA	949.80 USD
			Qty / Cost (In)	Qty / Cost (Out)	Status
			949.80 USD		Open Cost
			1		Open
5	15bar Coffee Machine Concentrated Coffee Semi-Automatic Pump Type Cappuccino Machine Italian Coffee Machine...	9SIVB4UHWT6011	314.39 USD	3 EA	943.17 USD
			Qty / Cost (In)	Qty / Cost (Out)	Status
			943.17 USD		Open Cost

Bill To:

Accounts Payable
 215-926-2032
 1852 N. 10th Street (08
 1st floor, TASB
 Philadelphia, PA 19122
 United States

Bill To Address Code: AP

Note: As mentioned above, the default values when creating a cost receipt do **not** account for previously created quantity receipts and vice versa. For instance, three cappuccino machines totaling \$314.39 each were ordered, totaling to \$943.17. A quantity receipt was entered for two of the machines. If another quantity receipt is created, the value will default to the one remaining machine. However, if the second receipt is instead a cost receipt, the default value will not account for the two previously received machines and will instead be the total \$943.17. It is therefore not recommended that you mix cost and quantity receipts for a given PO, as doing so is more likely to result in accidentally exceeding the order amount, which will delay payment.

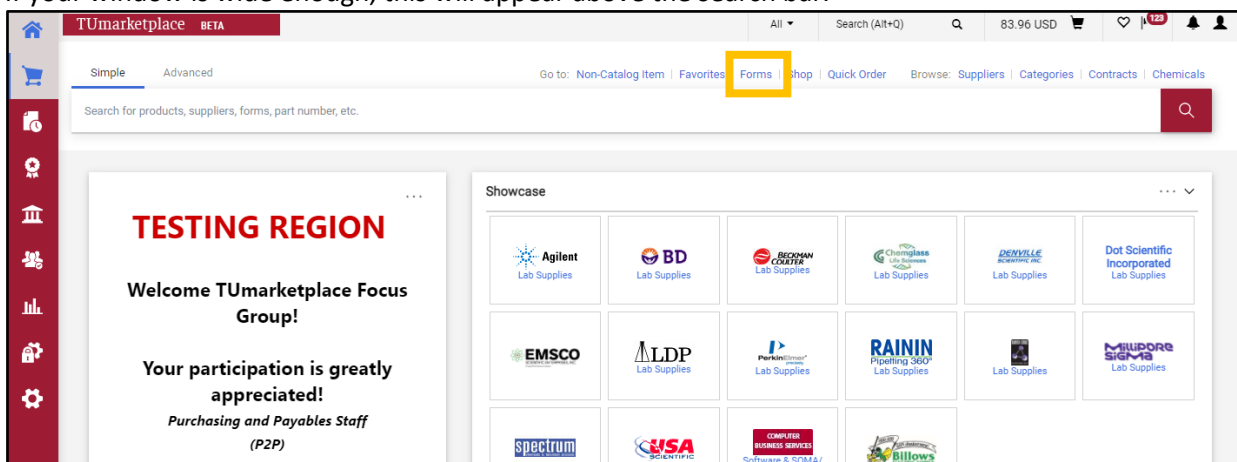
The screenshot displays two line items in a purchase order. The top item is a quantity receipt for 2 units of a 15bar coffee machine, with a total value of 943.17. The bottom item is a cost receipt for 1 unit of the same machine, also with a total value of 943.17. A yellow arrow points from the quantity '2' in the top item to the value '943.17' in the bottom item, illustrating that the cost receipt's value is based on the total order amount rather than the remaining quantity.

Line Item	Description	Contract No.	Quantity	Unit Price	Total Value	Receipt Type	Previous Receipts
5	15bar Coffee Machine Concentrated Coffee Semi-Automatic Pump Type Cappuccino Machine Italian...	9SIVB4UHWT6011	3 EA			Received	510904
5	15bar Coffee Machine Concentrated Coffee Semi-Automatic Pump Type Cappuccino Machine Italian...	9SIVB4UHWT6011	2		943.17	Received	510904
5	15bar Coffee Machine Concentrated Coffee Semi-Automatic Pump Type Cappuccino Machine Italian...	9SIVB4UHWT6011	1		943.17	Cost Received	510904, 510909

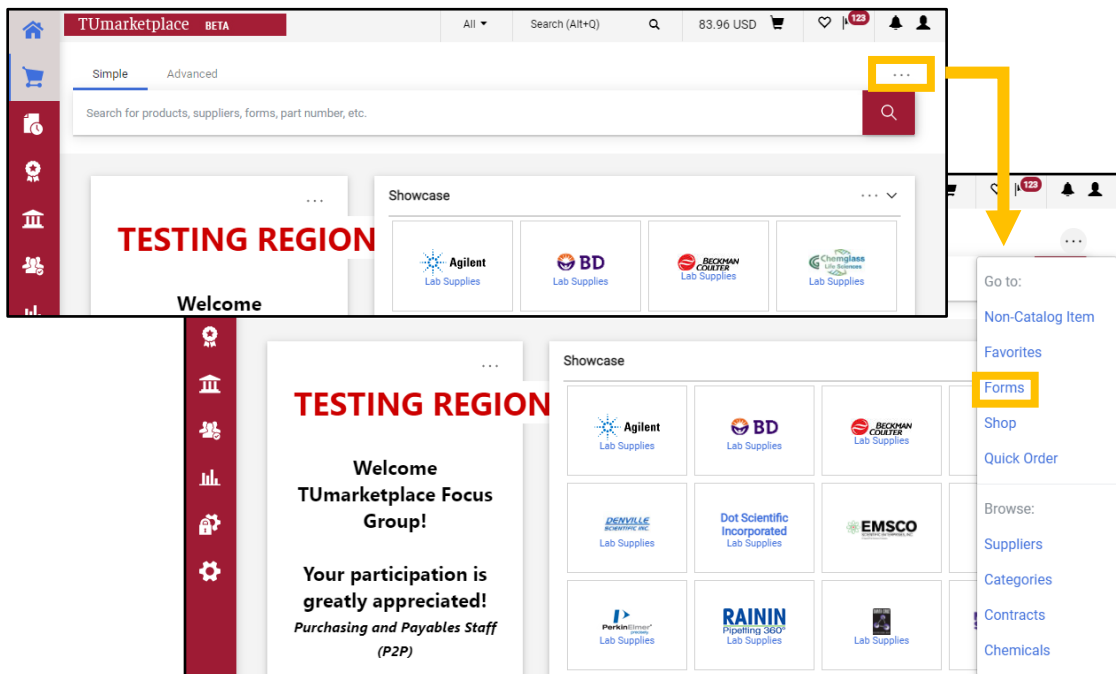
Creating a Payment Request Through TUmarketplace

Purpose: Purchase orders are not required for products or services totaling \$5,000 or less. When a Temple Purchasing Card (TPC or Pcard) is not accepted or not available, you may request payment by completing the Accounts Payable Invoice Payment form on TUmarketplace.

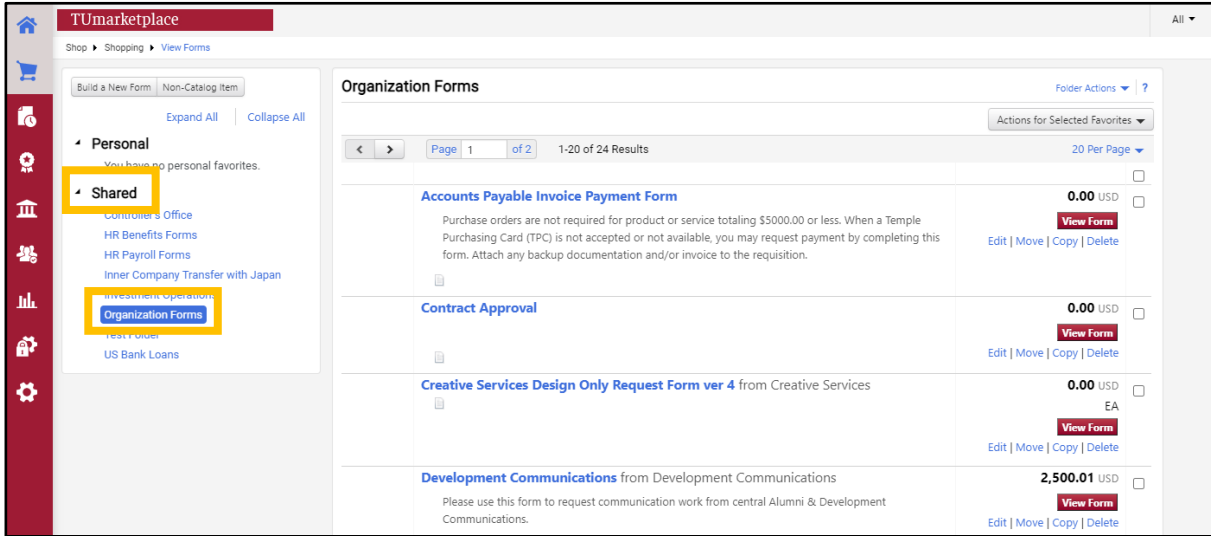
1. Log in to TUmarketplace.
2. Click the “Forms” link.
 - a. If your window is wide enough, this will appear above the search bar.



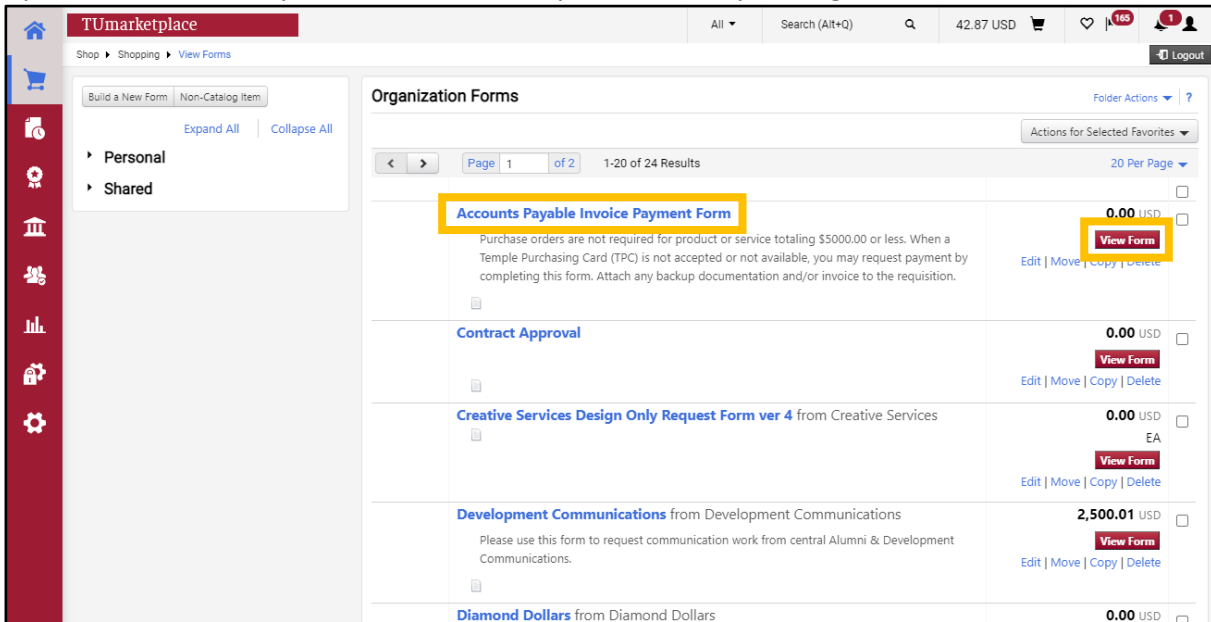
- b. If your window is too small, you must click the three dots above the search bar, and then click the “Forms” link.



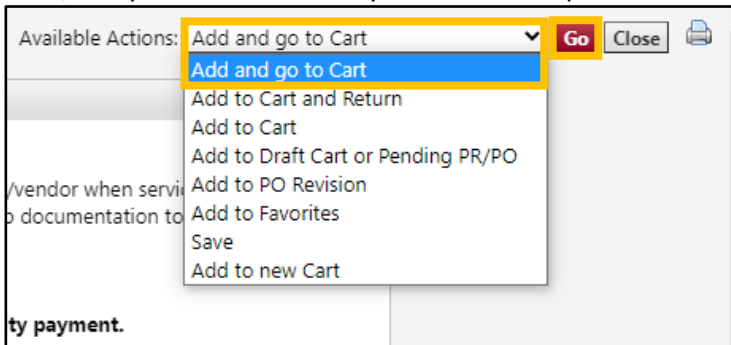
- Navigate to the correct folder in the panel on the left of the screen: Under “Shared”, click “Organization Forms”.



- Open the “Accounts Payable Online Invoice Payment Form” by clicking title or on the “View Form” button.




- Complete the form (see image on p. 3).
- Once the form is complete, select “Add and go to Cart” from the drop down at the top right of the window, click “Go”, and you will be taken to your cart to complete the transaction.



Accounts Payable Invoice Payment Form:

Accounts Payable Invoice Payment Form
Available Actions:



TEMPLE

UNIVERSITY®

Instructions

Use and Attachment Instructions

Please use this form to request payment to an individual/vendor when services or products have been received. You must attach an invoice and/or backup documentation to support the request.

The request will be routed for review and processing.

This form is not to be used for any employee or faculty payment.

NOTE: Invoice/Supporting Documentation must be attached or request will be returned. Please attach the invoice, as well as any other pertinent documents to the internal notes field of the requisition. All attached documents, including the W-9, should be saved as separate files.

General Information

Is this request a fee or award for an employee/faculty?

If yes to the above do not use this form, submit to Payroll.

Does Vendor accept a Pcard?

If yes to the question above, please enter the reason the Pcard is not being used?

100 characters remaining [expand](#) | [clear](#)

Is this payment related to a PO (No/Yes), Travel Advance or Upload?

PO Number

Is this request for a Student Refund?

If yes to the above, the student ID is required. Failure to supply this information will result in a delay in processing this request.

Student Name

Student Address

Student State

Student Zip

Student TUID (9 digit number)

Invoice Information

Invoice Number (if none enter N/A)

Invoice/Direct Pay Date

Invoice Amount

Payment Due Date

Payment Description

Describe Payment being Requested

500 characters remaining [expand](#) | [clear](#)

Does the account code to be charged start with a (7)?

Vendor Information

Enter Supplier

or [Supplier Search](#) | [Enter Manually](#)

If you do not have the vendor fax number or phone number, please enter your department office number or fax number above.

Address Sequence (BI 1-100) If Known

Commodity Code [search...](#)

Vendor Address

Address Line #1

Address Line #2

City

State

Zip Code

Vendor Additional Information

Payment Type

****Is this payment being made to or on behalf of a Non-U.S. Citizen or Non-Permanent Resident Alien?**

If the answer is "Yes" to the question above please attach the tax compliance form.

Does Vendor have W-9 on File

Is this payment for an Independent Contractor?

Is this invoice related to non-employee travel reimbursement?

Is Special Handling Required?

Special Handling Type

If Special Handling is Required, please describe in detail.

Special handling may result in a \$25.00 service charge.

Total 0.00

[See configurations for this form](#)

Supported Browsers

Purpose: This document provides details regarding the browsers and devices supported by Jaggaer.

Supported browsers:

Platform	Browser	Version
Windows	Internet Explorer (IE)	Version 11 only*
	Edge	Latest version with Windows 10
	Chrome	Latest version (automatically updated by Google)
	Firefox	Latest version (automatically updated by Mozilla)
Mac	Safari	4.0 and higher**
	Firefox	Latest version (automatically updated by Mozilla)
iPad	Safari	Embedded within the iPad**

*Previous versions of IE are no longer supported. Users will be redirected to a page displaying recommended browsers.

**Safari and iPad are supported by Jaggaer; however, not all supplier punch-out sites will support use of the browser or device.

Note: Email approvals are formatted specifically to work with embedded browsers for Android, Blackberry, and iPhone/iPad mobile devices. The readability of emails varies based on the email client and the format selected.

iPad configurations:

Setting	Option to select	How to update
Pop-up blocker	“Disabled”	Settings > Safari > General: Block Pop-ups
Open new tabs in background	“Disabled”	Settings > Safari > General: Open New Tabs in Background
Block cookies	“Allow from Websites I Visit” <u>or</u> “Always Allow”	Settings > Safari > Privacy and Security: Block Cookies
JavaScript	“Enabled”	Settings > Safari > Advanced > JavaScript

Notes:

- By default, the *pop-up blocker* and the *open new tabs in background* settings are enabled. Both of these must be updated manually. Other supported settings are Apple default settings and do not have to be changed unless they were previously changed from their defaults.
- The locations to update settings may vary slightly as Apple updates its operating system.
- iPad is supported by Jaggaer; however, not all supplier punch-out sites will support it.

Mobile devices:

Device maker	Version Support	Notes
Apple	iOS version 10.0 and higher	Apple requires you to have an iPhone 6s or higher in addition to the iOS version requirement.
Android	Android version 4.0.3 and higher	Android has no device requirements, meaning the mobile app will work on any type of Android phone as long as the operating system is 4.0.3 and higher.
Blackberry	Not officially supported but compatible	When the app is used on a Blackberry, it uses the device browser to display the app screens instead of showing you the screens in a true native app view. Whatever the default browser is on the device will be the browser used. Because the app is not supported, Blackberry users are not able to receive push notifications on their device.
Windows	Not officially supported but compatible	When the app is used on a Windows phone, it uses the device browser to display the app screens instead of showing the screens in a true native app view. Whatever the default browser is on the device will be the browser used. Because the app is not supported, Windows phone users are not able to receive push notifications on their device.