TUmarketplace User Guide

Prepared by Temple University Purchasing Services

Last updated June 2022

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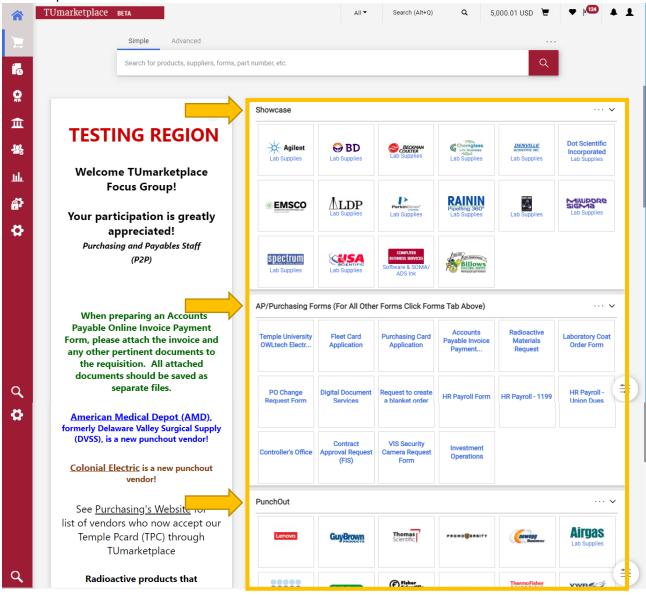
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Managing Your TUmarketplace Homepage

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.



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

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ш	Welcome TUmarketplace Focus Group!	PunchOut	Conference	Thomas Scientific	PROMOSEREITY		Airgas
₽ •	Your participation is greatly appreciated!		GuyBrown	Scientific	PROROUGEREITY	Business.	Lab Supplies
	Purchasing and Payables Staff (P2P)	QIAGEN	BIO RAD Lab Supplies	Eab Supplies Preferred Vendor	ISC BIOEXPRISS Lab Supplies	Thermo Fisher scientific formerly Life Lab Supplies	Lab Supplies E&I Pricing

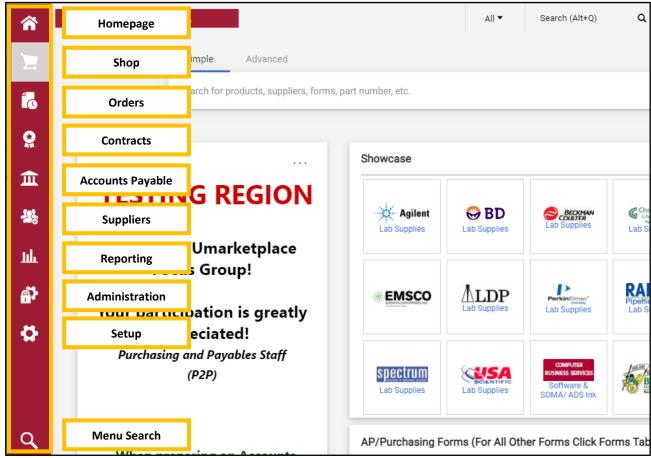
- 2. Important links on the homepage:
 - 2.1. On the homepage, there are useful links located above the search bar, including one to submit non-catalog requisition and another that will take you to the list of TUmarketplace forms. How these links appear depends on the width of your screen. If there is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

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11 2				Agilent Lab Supplies	BD Lab Supplies	BECKMAN Lab Supplies	Chemglass Lis Sciences Lab Supplies	DENVILLE scientric inc Lab Supplies	Dot Scientific Incorporated Lab Supplies

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

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	Purchas	ing and Payables Staff (P2P)	spectrum		COMPUTER RUSINESS SERVICES Software &	Billows		Contracts
			Lab Supplies	Lab Supplies	SOMA/ ADS Ink	The put of the		Chemicals

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.

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	Simple Advanced Go to: No	on-Catalog Item Favorites	Forms Shop	Farrah Al-Manso	or			
	Search for products, suppliers, forms, part number, etc.			View My Profile Dashboards				
				Manage Searches				_
8				Manage Search Exp	orts			
血				Set My Home Page				_
		Showcase		My Pending Requisit	tions			8
-12 <u>5</u>	TESTING REGION					Lo	gout	Help
Juli			BD ab Supplies		Supplies	scientific inc. Lab Supplies	Incorporate	
គ្នា	Welcome TUmarketplace							

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.

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	My Profile > User's Name, Phone Number, Email, et	с.							-10 Logout
E	Farrah Al-Mansoor		User's Name, Phone	Number, Email, etc.					?
í.	User Name tue71824		First Name	Farrah					
Q			Last Name	Al-Mansoor					
山 ま で し の	User Profile and Preferences User's Name, Phone Number, Email, etc Language, Time Zone and Display Settli App Activation Codes Early Access Participation Guided Tour Instructions Update Security Settings Default User Settings User Roles and Access Ordering and Approval Settings Permission Settings		PHONE NUMBER is a REQUIRED field. Please enter your work number and then click SAVE * Mobile Phone Number E-mail Address * Department Authentication Method	+1 215-204-6145 International phone number International phone number farrah@temple.edu					
	Notification Preferences Administration & Integration Shopping, Carts & Requisitions Purchase Orders	<	User Name ★	tue71824				Save C	hanges
٩	Catalog Management Accounts Payable Receipts Contracts Supplier Management Form Requests User History Administrative Tasks	>							

4. 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.

Farrah Al-Mansoor		Notification Preferences: Purchase	Orders	🖍 Edit Sectio
User Name tue71824				
		Prepared By - PO Workflow complete 💿	Email	
User Profile and Preferences	>	Prepared By - PO sent to Supplier 💿	Notification	
Update Security Settings	>	Prepared By - PO line item(s) rejected 💿	Email & Notification	
Default User Settings	>	Prepared by - PO line item(s) rejected		
User Roles and Access	>	Prepared By - PO rejected 💿	None	
Ordering and Approval Settings	>	PO submitted into Workflow	None	
Permission Settings	>	-		
Notification Preferences	<	PO pending Workflow approval 📀	None	
Administration & Integration		PO Workflow Notification available 📀	None	
Shopping, Carts & Requisitions		PO Workflow complete	None	
Purchase Orders		PO workhow complete	None	
Catalog Management		PO sent to supplier 💿	None	
Accounts Payable		PO Line Item Ship Notice 🚱	None	
Receipts				
Contracts		PO line item(s) rejected 💿	None	
Supplier Management		PO rejected	None	
Form Requests			News	
User History	>	PO line item Backorder notice 📀	None	
Administrative Tasks	>	PO line item Cancellation notice	None	

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".

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_	My Profile Notification Preferences Purcha	se Orders								🕄 Logo	out
	Farrah Al-Mansoor		Notification Preferences: Purchas	e Orders	5					?	,
í.	User Name tue71824										
<u>.</u>			Prepared By - PO Workflow complete 💿	C) Default	 Override 	Email			~	
- A TA	User Profile and Preferences	>	Prepared By - PO sent to Supplier 🚱	C) Default	Override	Notificati	on		~	
血	Update Security Settings	>									
	Default User Settings	>	Prepared By - PO line item(s) rejected 💿	C) Default	 Override 	Email & N	lotification		~	. 11
-122	User Roles and Access	>	Prepared By - PO rejected 🔞	C) Default	Override	None			~]	
	Ordering and Approval Settings	>	Frepared by Forejected	0	/ Derudit	O formation	None				
յլլ	Permission Settings	>	PO submitted into Workflow 🥝	C	Default	 Override 	Email				
	Notification Preferences	<					Notificati	on lotification			
្តរ	Administration & Integration		PO pending Workflow approval 📀		Default	 Override 		ouncation			
E.	Shopping, Carts & Requisitions		PO Workflow Notification available	0	Default	 Override 	None				
\$	Purchase Orders					-					
*	Catalog Management		PO Workflow complete	۲	Default	 Override 	None				

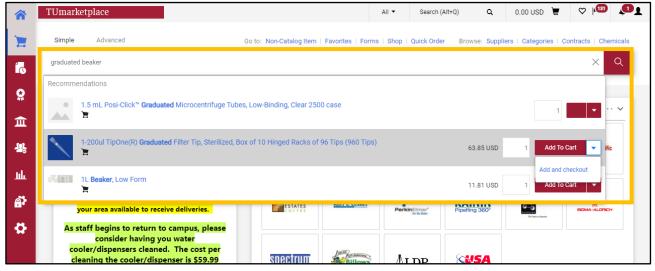
6. Access your notifications by clicking on the bell icon in the upper right corner of each TUmarketplace page.

☆ 🔤	ГUmarketplace вета		All 🗸	Search (Alt+C) Q	0.00 USD ` 🗮	∽ µ¹²⁴	٠
-	Simple Advanced Go t	o: Non-Catalog Item Favor	ites Forms S	Notifications				
-	Search for products, suppliers, forms, part number, etc.				No New	Notifications		
i o _	Search for products, suppliers, forms, part number, etc.					Click Here To Se	e All Notifications	
<u>o</u>			-					
<u>~</u>								
<u>ش</u>		Showcase						~
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	TESTING REGION	Showcase	BD Lab Supplies	BECXYMAN Lab Supplies	Champines Lab Supplies	DENVILLE Scentific Mc. Lab Supplies	Dot Scientific Incorporated Lab Supplies	c

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.

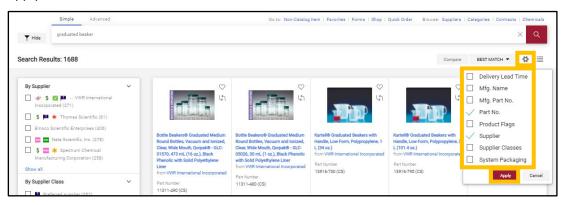
- 1. Log in to TUmarketplace.
- 2. Enter the name or description of the product in the large search bar toward the top of the homepage. As you type, recommendations might appear below the search bar. If you see one that might suit your needs, you can click on name of the product to view it or add it 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.



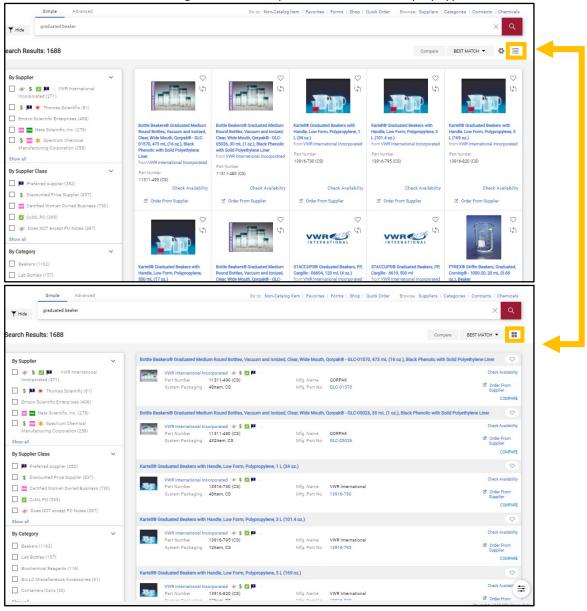
- 3. The search results will appear. You have a number of options regarding how your search results are displayed:
 - 3.1. Sort order: Select from the dropdown to choose how the results are sorted.

Simple Advanced			Go to: Non-Catalog	Item Favorites Forms Shop	Quick Order Browse: Suppliers C	Categories Contracts Chemical
T Hide graduated beaker					Compare	BEST MATCH 🕶 🚯 🗐
By Supplier	~	Sottle Beakers® Graduated Medium Round Bottles, Vacuum and Ionized, Claex, Wide Mouth, Ograph& - 0LC- 01570,473 mL (16 oz.), Black Phenolic with Solid Polyethylene Liner	Entite Beekers® Graduated Medium Round Bottles, Vecuum and Ionized, Clear, Wide Month, Oopake - Odd. Clear, Wide Month, Oopake - Odd. Oddie Polyethylene Liner from VWR International Incorporated	Kartel® Graduated Beakers with Handle, Low Form, Polypropylene, 1 L (24 oz) from VVR International Incorporated Part Number 13916-730 (CS)	Karteli® Graduated Beakers with Handle, Low Form, Polypropriene, 3 L (1014 oz.) from VWR International Incorporated Part Number 13916-795 (CS)	Best Match Part Number Description Size Packaging UOM Supplier (Price: Low to High) (Price: High to Low)
By Supplier Class Bit Preferred supplier (352) \$ Discounted Price Supplier (837) Certified Women Owned Business (73)	•	from WWR International Incorporated Part Number 11311-490 (CS) Check Availability 2 Order From Supplier	Part Number 11311-480 (CS) Check Availability 2 Order From Supplier	Check Availability 연 Order From Supplier	Check Availability 안 Order From Supplier	Check Availabilit
CxML PO (395) & Oces NOT except PO Notes (387)		© 15		♡ 5	♡ 	

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.

S	imple Advanced		Go to: Non-Catalog Item Favorites Forms Shop Quick Order Browse: St	uppliers Categories Contracts Chemicals
▼ Hide gra	aduated beaker			XQ
earch Results:	1688			Compare BEST MATCH -
By Supplier	~	Bottle Beakers® Graduated Medium Round Bottles, Va	cuum and Ionized, Clear, Wide Mouth, Qorpak® - GLC-01570, 473 mL (16 oz.), Black Ph	enolic with Solid Polyethylene Liner
Incorporated	VWR International (271) fhomas Scientific (81) tific Enterprises (406)	VWR International Incorporated \$ 2 Part Number 11311-490 (CS) System Packaging 48Item, CS	Mfg. Name QORPAK Mfg. Part No. GLC-01570	Check Availability Order From Su COMPARE
	Scientific, Inc. (278) ipectrum Chemical Ig Corporation (258)	Bottle Beskers® Graduated Medium Round Bottles, Va WRR International Incorporated	cuum and Ionized, Clear, Wide Mouth, Qorpak® - GLC-05026, 30 mL (1 oz.), Black Phen Page - Mfg. Name QORPAK Mfg. Part No. GLC-05026	olic with Solid Polyethylene Liner 🗢 Check Availability Check Availability 20 Order Form Supplier COMPARE
	supplier (352)	Kartell® Graduated Beakers with Handle, Low Form, Po	olypropylene, 1 L (34 oz.)	(\heartsuit)
Certified 1	ed Price Supplier (837) Women Owned Business (730) (395) T except PO Notes (387)	VWR International Incorporated & \$ 2 Part Number 13916-730 (CS) System Packaging 48Item, CS	Mfg. Name VWR International Mfg. Part No. 13916-730	Check Availability 2 Order From Supplier COMPARE
Show all		Kartell® Graduated Beakers with Handle, Low Form, Po	olypropylene, 3 L (101.4 oz.)	0
By Category Beakers (116) Lab Bottles (1	157)	VWR International Incorporated & \$ 2 Part Number 13916-795 (CS) System Packaging 12Item, CS	Mfg. Name VWR International Mfg. Part No. 13916-795	Check Availability E Order From Supplier COMPARE
Biochemical F		Kartell® Graduated Beakers with Handle, Low Form, Po	olypropylene, 5 L (169 oz.)	\heartsuit
Containers/Co	llaneous Accessories (61) ians (33)	VWR International Incorporated 🔹 \$ 🖉 Part Number 13916-820 (CS)	Mfg. Name VWR International Mfg. Part No. 12015 020	Check Availabi ^r 😅 🖻 Order From

ompare 2 Items			vse Suppliers Categories Contracts Chemicals
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cubic feet		•	
		ACTIONS FOR 0 SELECTED ITEMS *	2 Compare BEST MATCH * III
			lack Phenolic with Solid Polyethylene Liner 🛛 👳
			Check Availability
Add to Cart			년. Order From Supplier COMPARE X
	NOUTR	NOUTO CONTRACTOR OF THE OWNER	ck Phenolic with Solid Polyethylene Liner
roduct Image			Check Availability
	larger image	arger image	12 Order From Supplier
			COMPARE X
roduct Details	■ Bottle Beakers® Graduated Medium Round Bottles, Vacuum and Ionized, Clear, Wide Mouth, Qorpak® - GLC-01570, 473 mL (16	International Beakers® Graduated Medium Round Bottles, Vacuum and Ionized, Clear, Wide Mouth, Qorpak® - GLC-05026, 30 mL (1 oz.),	Ø
	oz.), Black Phenolic with Solid Polyethylene Liner	Black Phenolic with Solid Polyethylene Liner	Check Availability
Catalog No.	11311-490 (CS)	11311-480 (CS)	Coder From Supplier
rice	C Order From Supplier	ট Order From Supplier	COMPARE
			Q
Supplier	VWR International Incorporated	VWR International Incorporated	Check Availability
Category	Labware Washer/Dryer Accessories	Labware Washer/Dryer Accessories	COMPARE
			•
			Check Availabi'
		Artinita (Artinitation) Artinitation	🗹 Order From

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

Simple	Advanced		Go to:	Non-Catalog Item Favorites	Forms Shop Quick Order Brows	se: Suppliers Categories Contracts Chemicals
▼ Hide graduate	ed beaker					XQ
earch Results: 406						Compare BEST MATCH -
Your Selections		Beaker, Graduated, Scienceware every 500mL, 7.25 in.H, Top OD			spout, Chemical-resistant, Stackable, Autor	clavable, Molded-in raised graduations
X By Supplier: Emsco S By Supplier C Emsco Scientific En	~	Emsco Scientific En Part Number System Packaging	S43498	Mfg. Name Mfg. Part No.	Bel Art Products F26217-0000/EMD	E [®] Order From Supplier COMPARE
By Category	~	Beaker, Plastic, Graduated, Capa	c. 500mL, BP0500 1/EA			0
Beakers (350) Lab Bottles (47) Graduated Cylinders	s (3)	Emaco Scientific En Part Number System Packaging	S63118	Mfg. Name Mfg. Part No.	United Scientific Supplies Inc BP0500	2 Order From Supplier COMPARE
Scoops (3)		Beaker, Graduated, SI Metric, Ne 1/EA	sting, Plastic, Unbreakable, Ea	asy-to-read blue graduations, Se	t of five, includes one beaker of each capa	city: 50, 100, 250, 500, and 1000mL, 78390
Lab Brushes (1) Show all By Commodity Code	~	Emsco Scientific En Part Number System Packaging	S95591	Mfg. Name Mfg. Part No.	Si Metric Manufacturing Limited 78390	년 Order From Suppler COMPARE
41000005 (406)					ise: 3.98 in., 10.1 cm, Diameter op: 5.1 in., 1	12.9 cm, Disposable: Yes, Graduated: Yes, 🔗
By Packaging UOM	~	Height: 4.17 in., 10.59 cm, includ	les: Four Way Pour Spout, Ter	nperature Max. Op		
CS (180)		Emsco Scientific En Part Number System Packaging	08732125	Mfg. Name Mfg. Part No.	Fisher Scientific 08732125	2 Order From Supplier COMPARE
EA (74)		Fisherbrand Graduated Polystyre Yes, Height: 4.25 in., 10.79 cm, I			lase: 4.02 in., 10.21 cm, Diameter op: 5.35	in., 13.5 cm, Disposable: Yes, Graduated:
By Result Type Products (406)	~	Emsco Scientific En Part Number System Packaging	08732126	Mfg. Name Mfg. Part No.	Fisher Scientific	년 Order From Supplier

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.

ple	Beaker, Plastic, Graduated, Capac. 500	mL, BP0500 1/EA			< >	×	at
ate		Product Details				~	
06		Supplier	Emsco Scientific Enterprises	Supplier UOM	EA		are
		Supplier Size	500mL	Buyer UOM	EA		in r
0 S	larger image	Buyer Size	500mL	Part Number	S63118		l
En	arger intage	Manufacturer Name	United Scientific Supplies Inc	Manufacturer Part Number	BP0500		I
	Add Favorite	System Product Size	500mL	Category	Beakers		l
l	V Add Pavonie	Category UNSPSC	41-12-18-03	Color			l
l		Image URL	https://assets.fishersci.co m/TFS 📑	Lead Time	7		I
den		More Information URL	https://fishersci.com/itemd etail	UNSPSC	41-12-18-03		50
		Beaker, Plastic; Graduated; Ca	pac. 500mL				I
					EA Order from Supplie	er 🎵	ble
	V Height, 4.1						

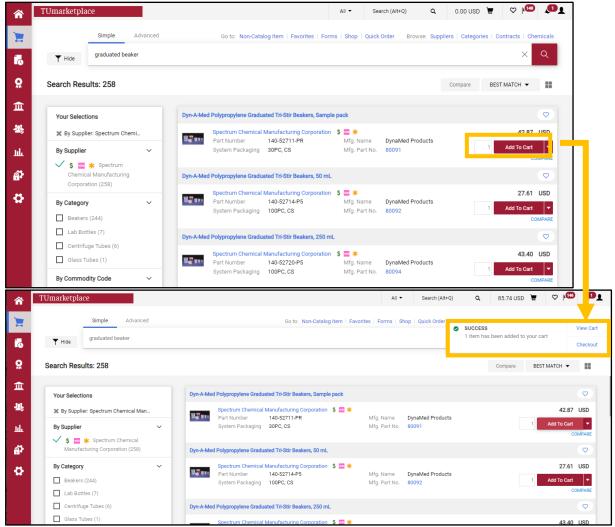
- 6. If, after you have reviewed the search results, you find an item you would like to purchase, you can add it to your cart.
 - 6.1. If the item is sold by a punch-out supplier, click "Order from Supplier" you will be taken to the supplier's punch-out catalog.

						×
					Compare	BEST MATCH 🔻
Bottle Bea	akers® Graduated Med	lium Round Bottles, Vacuum and I	onized, Clear, Wide Mouth,	Qorpak® - GLC-01570, 473 mL (16 oz.), Black Phenolic with Solid F	Polyethylene Liner
-	VWR International In	ncorporated 🛷 \$ 🗾 🎟				Check Availab
(delaster)	Part Number	11311-490 (CS)	Mfg. Name	QORPAK		C Order From
	System Packaging		Mfg. Part No.			Supplier
Bottle Bea	akers® Graduated Med	fium Round Bottles, Vacuum and I	onized, Clear, Wide Mouth,	Qorpak® - GLC-05026, 30 mL (1 oz.), E	Black Phenolic with Solid Pol	lyethylene Liner
Bottle Bea		lium Round Bottles, Vacuum and i	onized, Clear, Wide Mouth,	Qorpak® - GLC-05026, 30 mL (1 oz.), E	Black Phenolic with Solid Pol	lyethylene Liner
Bottle Bea			onized, Clear, Wide Mouth, Mfg. Name	Qorpak® - GLC-05026, 30 mL (1 oz.), E QORPAK	Black Phenolic with Solid Pol	Check Availab
Bottle Ber	VWR International In	ncorporated 🛷 \$ 😰 🏴 11311-480 (CS)		QORPAK	Black Phenolic with Solid Pol	
Bottle Ber	VWR International In Part Number	ncorporated 🛷 \$ 😰 🏴 11311-480 (CS)	Mfg. Name	QORPAK	Black Phenolic with Solid Pol	Check Availab
riit.	VWR International In Part Number System Packaging	ncorporated 🛷 \$ 😰 🏴 11311-480 (CS)	Mfg. Name Mfg. Part No.	QORPAK	Black Phenolic with Solid Pol	Check Availab C Order From Supplier
riit.	VWR International In Part Number System Packaging Graduated Beakers with	ncorporated 😻 \$ 🔽 🏴 – 11311-480 (CS) 432ltem, CS	Mfg. Name Mfg. Part No.	QORPAK	Black Phenolic with Solid Pol	Check Availab C Order From Supplier COMP
riit.	VWR International In Part Number System Packaging Graduated Beakers with	ncorporated 😻 \$ 🛛 🏴 – 11311-480 (CS) 432Item, CS h Handle, Low Form, Polypropylend	Mfg. Name Mfg. Part No.	QORPAK	Black Phenolic with Solid Pol	Check Availab Check Availab Supplier COMP Check Availab
riit.	VWR International In Part Number System Packaging Graduated Beakers with VWR International In	ncorporated (# \$ 2 1	Mfg. Name Mfg. Part No. e, 1 L (34 oz.)	QORPAK GLC-05026	Black Phenolic with Solid Pol	Check Availab Check Availab Supplier COMP

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.

Products App	lications & F	rotoco	ols ~	Featured	Solutions	~	Search	by k 11311-49	0	1/1	^	~	×
					[Add	to Quote	Add to 9	Shopping Li	st A	dd to	Cart	
Small Business Enterprise													
Black Phenolic with Solid Polyethylene Liner Small Business Enterprise	30 mL (1 oz.)	33- 400	Vacuum and Ionized	GLC- 05026	11311-4	80	Case of 432	Direct from Supplier	\$405.86	-	0	+	
Black Phenolic with Solid Polyethylene	473 mL (16 oz.)	70- 400	Vacuum and	GLC- 01570	11311-49	90	Case of 48	Direct from Supplier	\$154.50	-	1	+	1
Liner Small Business Enterprise	02.)	400	Ionizeu	01570	-		01 48	Subbuer					
Green Thermoset with F217 & PTFE Liner	237 mL (8 oz.)	58- 400	Vacuum and Ionized	GLC- 01535	36319-1	798	Case of 24	Direct from Supplier	\$105.31	-	0	+	
Small Business Enterprise													
Green Thermoset with F217 & PTFE Liner	120 mL (4 oz.)	48- 400	Vacuum and Ionized	GLC- 01507	36319-	797	Case of 24	Direct from Supplier	\$131.35	-	0	+	

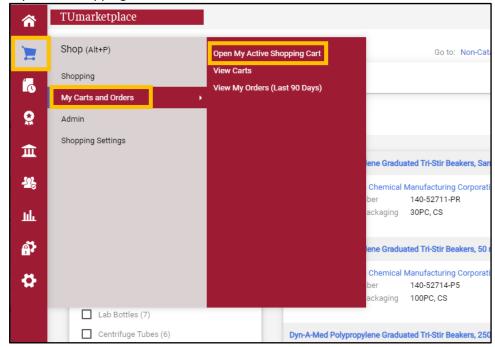
6.2. If the item is sold by a showcased supplier, enter the desired quantity and click "Add to Cart". A notification will appear confirming that the item has been added to your cart. Click "View Cart" to see the items in your cart or "Checkout" if you wish to check out. Otherwise, continue shopping and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



- 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".

		All 🔻	Search (Alt+Q)	Q	42.87 USD 📜	♡ 1 ¹⁴⁶	1		
Non-Catalog		My Cart (2021-06-23 tue71824 01)							
ion outdrog	U J u:	Quantity: 1	Dyn-A-Med Polypropylene Graduat Quantity: 1 Price: 42.87 USD		View My Cart	ntracts Che	Q		
					Checkout 42.87 US	D матсн 👻			
ers, Sample	pack						0		
orporation	\$ 🚾 ≭	Mfg. Name Mfg. Part No.	DynaMed Products 80091		1	42.87 Add To Cart	USD		
		-				CC	MPARE		

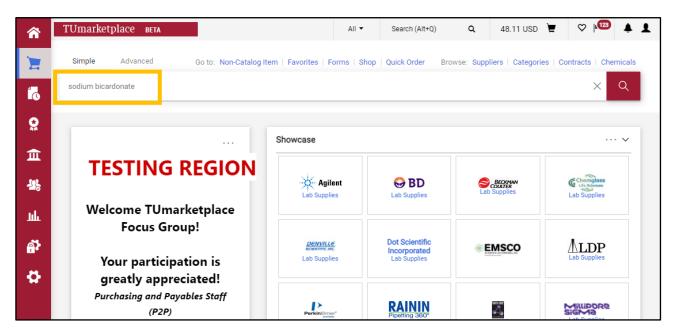
7.2. Hover over the cart icon at the left side of the screen, hover over "My Carts and Orders", and click on "Open My Active Shopping Cart."



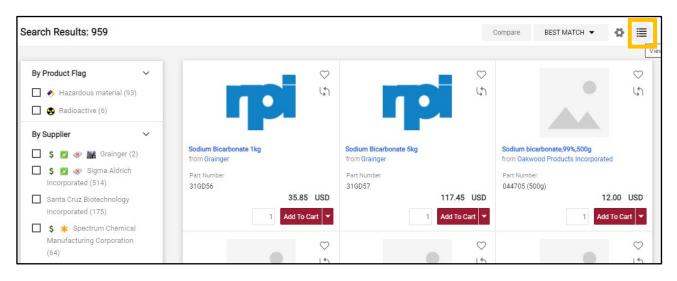
Comparing Products Side by Side

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.

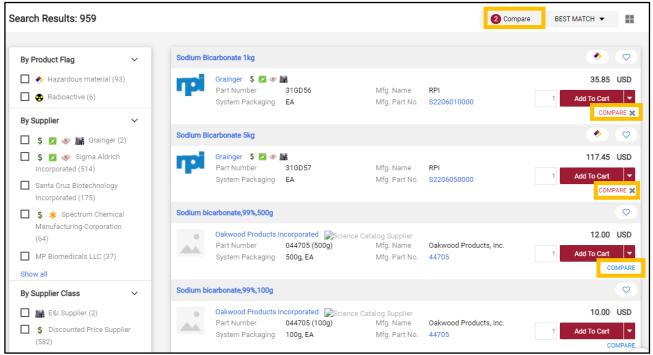
- 1. Log in to TUmarketplace.
- 2. Use the search feature in TUmarketplace to locate the items you are looking to purchase.



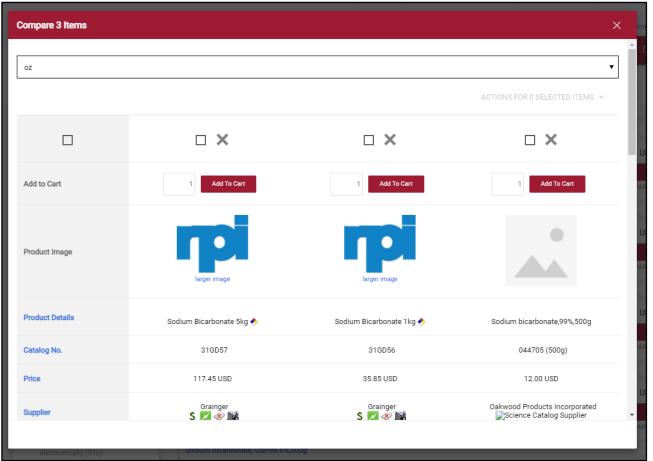
3. Make sure you are viewing the results in list view; if you are in grid view, click the list icon to the upper right of the search results.



4. 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.



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



6. 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.

		— ×	□ ×	×
	Add to Cart	1 Add To Cart	1 Add To Cart	1 Add To Cart
	Product 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
Add to Cart	Supplier	Grainger S 🜌 參加書	srainger S 🜠 🛷 🏙	Oakwood Products Incorporated
Product Image				
Product Details	Sodium bicarbonate,99%,500g	Sodium Bicarbonate 1kg 🔶	Sodium Bicarbonate 5kg	•
Catalog No.	044705 (500g)	31GD56	31GD57	
Price	12.00 USD	35.85 USD	117.45 USD	
Supplier	Oakwood Products Incorporate	d Grainger S 📈 🕸 🎼	Grainger S 🗾 🛷 🎎	

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

Compare 3 Items		, ,		×
				•
oz				
			ACTIONS FOR 0 SELECTED ITEMS 👻	
	□ ×	□ ×		
Add to Cart	Add To Cart	1 Add To Cart	1 Add To Cart	_
Product Image				
Product Details	Sodium bicarbonate,99%,500g	Sodium Bicarbonate 1kg 🔶	Sodium Bicarbonate 5kg 🔶	
Catalog No.	Compare 2 Items			×
Price				
Supplier	Oa I			▼ ACTIONS FOR 0 SELECTED ITEMS ▼
		□ ×		□ ×
	Add to Cart	1 Add To C	Dart	1 Add To Cart
	Product Image	•		
	Product Details	Sodium bicarbonate,99	9%,500g	Sodium Bicarbonate 1kg 🔶
	Catalog No.	044705 (500g))	31GD56
	Price	12.00 USD		35.85 USD
	Supplier	Oakwood Products Inco	orporated upplier	Grainger S 🜌 🕸 🖍

- 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.

Compare 2 Items	
oz	
	□ ×
Add to Cart	2 Add To Cart
Product Image	
Product Details	Sodium bicarbonate,99%,500g
Catalog No.	044705 (500g)
Price	12.00 USD
Supplier	Oakwood Products Incorporated

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".

Compare 2 Items		Add To Active Cart
oz		Add to Favorites Remove ACTIONS FOR 2 SELECTED ITEMS
\checkmark	×	×
Add to Cart	2 Add To Cart	3 Add To Cart
Product Image		larger image
Product Details	Sodium bicarbonate,99%,500g	Sodium Bicarbonate 1kg 🔶
Catalog No.	044705 (500g)	31GD56
Price	12.00 USD	35.85 USD
Supplier	Oakwood Products Incorporated	Grainger S 📈 ≪ Mini

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".

		All 🔻	Search (Alt+Q)	م	42.87 USD 📜	♡ 146 💶 👤
Non-Catalog It	-	(2021-06-23 tue7	71824 01)			ntracts Chemicals
Von-Catalog	UJun	Quantity: 1	Dyn-A-Med Polypropylene Graduat Quantity: 1 Price: 42.87 USD		View My Cart	× Q
		Ffice: 42.87 0	50		Checkout	
					42.87 US	D матсн 👻
ers, Sample	pack					\bigcirc
orporation	\$ 🚥 \star					42.87 USD
		Mfg. Name Mfg. Part No.	DynaMed Products 80091		1	Add To Cart COMPARE

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."

â	TUmarketplace		
1	Shop (Alt+P)	Open My Active Shopping Cart	Go to: Non-Cat
í.	Shopping	View Carts	
	My Carts and Orders	View My Orders (Last 90 Days)	
	Admin		
血	Shopping Settings		ene Graduated Tri-Stir Beakers, San
4 2			Chemical Manufacturing Corporati ber 140-52711-PR
հղ			ackaging 30PC, CS
a 7			lene Graduated Tri-Stir Beakers, 50 i
\$			Chemical Manufacturing Corporati ber 140-52714-P5 ackaging 100PC, CS
	Lab Bottles (7)		
	Centrifuge Tubes (6)	Dyn-A-Med Polypropy	lene Graduated Tri-Stir Beakers, 250

2. 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).

TU	Umarketplace в	TA			All 🕶	Search (Alt+Q)	٩	129.39 USD 🗎	♡ 12	+
1	Shopping Cart 🝷								٩	•
Ι.	Simple Advan	ced					Detail	s		~
	Search for products, s	uppliers, forms, part number, etc.				٩	For Farrah	Al-Mansoor		
	Cart Name	2021-06-23 tue71824 02	Prepared for	Farrah Al-Mansoor	(2	Estim	ate (129.39 USD)	129.39	~
	Description						Total		129.39	USD
	Priority	Normal						Proceed To Che Assign Ca		
	Internal Note									
		1000 characters remaining expan	d clear							
	1 Item									
	Laboratory Dispo	sable Products · 1 Item · 129.39 USD				🗆				
	SUPPLIER DETAILS	\$ Science Catalog Supplier Business 1 : 960-	C Belmont Aveunue, North Haledon, N	ew Jersey 07508 United States						
	Contract	no value PO Number								
	Item	Catalog	No. Size/Packagi U	Init Price Quantity	Ext. Price					

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".

		•							
Details		~							
For									
Farrah Al-Mansoor									
Estimate (129.39 U	SD)	\sim							
Subtotal	129.3	9							
Total	129.3	9 USD							
Proce	ed To Checkout								
,	Assign Cart								
uisition - : 328136	1							۲	•
mmary PO Preview Cor	mments Attachments	History							
<u></u>		ione (xxx-	no value						
		one (xxx-	no value					Draft	
	Ph	ione (xxx- xx) der Contact			TPCard (<\$5K)		,	Draft Total (129.39 USD)	
	Ph xoo	ione (xxx- xx) der Contact				orders less that			129.
	Ph xxx Orr Err	ione (xxx- xx) der Contact	no value		Use your Temple pCard for you see an edit button avai			Total (129.39 USD)	
	Ph xoo En De	ione (xxx- xx) der Contact nail	no value	ay				Total (129.39 USD)	129
	Ph xoo En De	ione (xxx- ixx) der Contact nail livery Option :	no value S	ay	Use your Temple pCard for you see an edit button avai		n \$5K if	Total (129.39 USD) Subtotal	129
counting Codes	Ph xoo En De	ione (xxx- ixx) der Contact nail livery Option :	no value S	By	Use your Temple pCard for you see an edit button avai			Total (129.39 USD) Subtotal Pleoo Order Assign Cart	129.
	Ph xoo En De	one (xox- xx) der Contact nail livery Option: ip Via	no value S	ay Program	Use your Temple pCard for you see an edit button avai		n \$5K if	Total (129.39 USD) Subtotal Place Order Assign Cart What's next for my order?	129
hart Fund	Ph coo Gr En Sh Organizatic 83000	one (xox- ox) der Contact nail livery Options ip Via	no value S Best Carrier-Best Wi		Use your Temple pCard for you see an edit button avai No credit card has been as	signed.	n \$5K if	Total (129.39 USD) Subtotal Pleos Order Assign Cart What's next for my order?	129.
mart Fund 100000 mple University Operating	Ph poc Prind Purchasing Is Prind Purchasing Is	ione (xox- ox) der Contact nail livery Option: ip Via on	no value s Best Carrier-Best W Account 7200	Program 06 Institutional Support	Use your Temple pCard for you see an edit button avai No credit card has been as Activity	signed.	n \$5K if	Total (129.39 USD) Subtotal Place Order Assign Cart What's next for my order? Next Step WaltForPRApprovals	129.
nart Fund 100000 Operating ernal Notes and Attachmer ernal Note <i>no value</i>	Ph 300 Pind Pind Pints Pint Pint Pint Pint Pint Pint Pint Pint	one (xox- xx) der Contact nail livery Option: ip Via pr dein	no value s Best Carrier-Best Wi Account 7200 General Supplies	Program 06 Institutional Support	Use your Temple pCand for you see an edit button avail No credit card has been as Activity no value Purchasing Use Only Buyer Name no value	signed. Location no value	n \$5K If	Total (129.39 USD) Subtotal Place Order Assign Cart What's next for my order? Next Step WaitForFRApprovals Approver Marshall, Andrew	129. 129.
hart Fund 100000 operation ternal Notes and Attachmen ernal Note no value ernal Add	p Fund Samo Samo Samo Samo Samo Samo Samo Samo	ione (xox- iox) der Contact nail livery Options ip Via dein dein ternal Note tetnal Note tetnal pilers tachments	no value Rest Carrier-Best Wi Account 7200 General Supplies and Attachments no value Add	Program 06 Institutional Support	Use your Temple pCand for you see an edit button avail No credit card has been as Activity no value Purchasing Use Only Buyer Name no value (for Purchasing Dept Only)	signed. Location no value	n \$5K If	Total (129.39 USD) Subtotal Place Crider Assign Cert What's next for my order? Next Step WallForFRApprovals Approver Marshall, Andrew Workflow: Parts Partsh Al-Mansoor Partsh Al-Mansoor	129. 129.
ternal Note no value	Pin De Show Prind Baboo Prind Purchasing Is No Su Att for	one (xxx- xx) der Contact hail ilvery Options ip Via on dein ternal Note tet a all pppliers	no value Rest Carrier-Best Wi Account 7200 General Supplies and Attachments no value Add	Program 06 Institutional Support	Use your Temple pCand for you see an edit button avail No credit card has been as Activity no value Purchasing Use Only Buyer Name no value	signed. Location no value	n \$5K If	Total (129.39 USD) Subtotal Place Order Assign Cart What's next for my order? Next Step WallFor/PRAprovals Approver Marshall, Andrew Workflow	129. 129.

TUmarketplace	e beta	All • Search (Alt+Q) Q 0.00 USD
2	Simple Advanced	
6	Search for products, suppliers, forms, part number, etc.	٩
<u>e</u>	Requisition 3281361 Subm	nitted
Ω.	Summary	Options
25	Requisition number 3281361	□ Print
սև	Requisition status Pending	Recent orders
	Cart name 2021-06-23 tue71824 02	Return to your home page
ar -	Requisition date 6/23/2021	
87 12	Requisition date 6/23/2021 Requisition total 129.39 USD	

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".

Summary PO Pre-	eview Comments	Attachment								
			Phone (xxx- xxxx)	no value					Draft	
			Order Contact Email	no value		TPCard (<\$5K)		ø	Total (129.39 USD)	`
						Use your Temple pCard you see an edit button a	l for orders less th available here.	an \$5K if	Subtotal	129.3
			Delivery Options	s Best Carrier-Best Way	у	No credit card has been	n assigned.		Place Order	129.3
									Assign Cart	
Accounting Codes	1							ø v		
Chart	Fund	Organiz			Program	Activity	Location	<i>▶</i> ∨	What's next for my order? Next Step WaitForPRApprov	als
Chart		83000		7200	Program 06 Institutional Support	no value	Location no value	<i>•</i> ···· •		als
Chart F Femple University	Fund 100000 Operating Fund	83000	ing Main	7200	06	no value	no value	۵ ^۵ ۰۰۰۰ ۲	Next Step WaitForPRApprov	als
nternal Add	Fund 100000 Operating Fund d Attachments value	83000 Purchasi	ing Main External Note Note to all Suppliers	7200 General Supplies es and Attachments no value	06 Institutional Support	no value	no value y		Next Step WaitForPRApprov Approver Marshall, Andrew	als
Chart T Temple University Internal Notes and Internal Note no	Fund 100000 Operating Fund d Attachments value	83000 Purchasi	External Note	7200 General Supplies es and Attachments no value Add	06 Institutional Support	no value Purchasing Use Only Buyer Name no va (for Purchasing	no value y		Next Step WaltForPRApprov Approver Marshall, Andrew Workflow Draft Active	als

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

Assign Cart: User S	earch		×
Assign Cart To:	no volvo o <mark>SEARCH</mark>		
ng Note To Assignee:			4
lo 1e U		Assign	Close
Montgomery	1st	tioor, TASB	

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

User Search		×
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				×
New Search				
Name ^	User Name	Email	Phone	Action
MULLER, LESLIE	Imuller	lmuller@temple.edu	+1 215-707-3874	+
Muller, Jennifer	robbins	jmuller@temple.edu	+1 215-204-0699	+
				Close
	ir you are a information	Reviewer, enter your Billing Option here to be contacted with	What's	next for my order? 🗸 🗸

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

Assign Cart: User S	earch		×	
Assign Cart To: Add to Profile	MULLER, LESLIE or SEARCH			~
Note To Assignee:			h	
		Assign	Close	
United States	Unite	ed States	_	

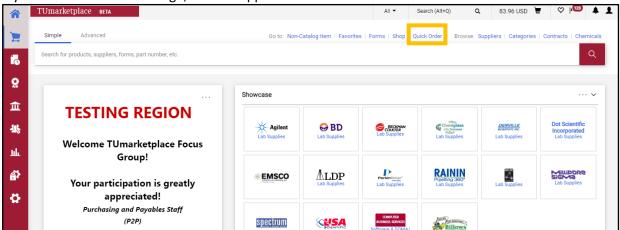
2.2.6. A confirmation page will appear.

â	TUmarketplace	BETA		All 🔻	Search (Alt+Q)	۵	0.00 USD 📜	y ⊗ µ ¹ 2	3	1
1		Simple	Advanced							
٦		Search for	products, suppliers, for	ms, part numb	er, etc.		Q			
e		⊘ Ca	art Assigned							
血		Requisition	n Summary		Options					
22		Requisition 3281365	number		Create new draft o	art				
Jul.		Cart name 2021-06-23	tue71824 03		Recent orders					
.		Requisition 129.39 USE			Return to your hor	ne page				
\$		Number of								
		1								

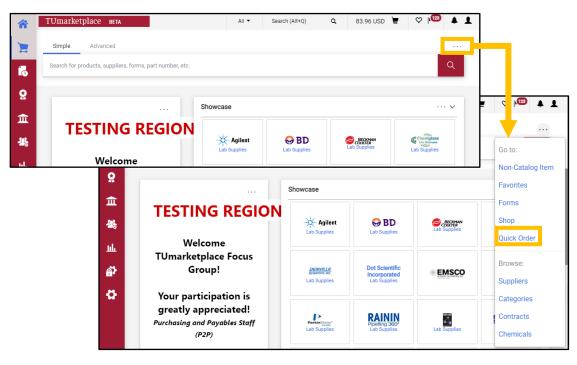
Placing a Quick Order

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.

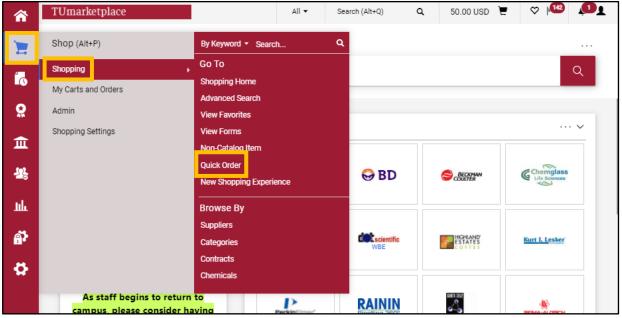
- 1. Log in to TUmarketplace.
- 2. Navigate to the Quick Order page in one of the below ways:
 - a. If your window is wide enough, this will appear above the search bar.



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.

- Quick Order		Add
	Category Everything.	
Note: The default setting of "Everything" will search	Part Number	Category
across all categories	SKU	Everything
throughout the entire database of	Part Number	Lab Supplies
TUmarketplace's hosted	SKU Part Number	– Antibodies
	SKU	Medical/Clinical
	Part Number	Office/Computer
	SKU	MRO/Facilities
	Part Number	Furniture
	SKU	Services
		Manufacturing
		Books
		Electronics
		Specialty
		Food/Food

- 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.

Category					
Everything	•	Category		8 96126624E1 MULTI RESULTS RETURNED	
Part Number		Everything	•	Search	_
96126624E1	×	Part Number		961-26624-E1 ADD	ED TO CART
art Number		96126624E1	×	Description:	Cover, 20 mm dia., for 1
961-26624-E1	×	 Multiple or similar res 	sults returned	mL Beakers Supplier:	
art Number		Part Number		Spectrum Chemical M Corporation	Manufacturing
SKU		SKU			
		Part Number			
		0/41		Compare BEST	MATCH 👻
earch Results: 1	D	vnalon PTFE Beaker Cover. 20 m	m dia for 1 mL Beakers	Compare BEST	MATCH -
earch Results: 1		Part Number System	m dia., for 1 mL Beakers Ianufacturing Corporation \$ 1 961-26624- Mfg. Name E1 Mfg. Part No. 1PC, EA	* Dynaion	MATCH - III 7.46 USD Add To Cart COMPARE
earch Results: 1 By Supplier S Chemical Manufacturing		Spectrum Chemical M Part Number	Nanufacturing Corporation \$ 961-26624- Mfg. Name E1 Mfg. Part No.	* Dynaion	7.46 USD Add To Cart
earch Results: 1 By Supplier S Chemical Manufacturing Corporation (1) By Supplier Class C certified Women		Spectrum Chemical M Part Number System	Nanufacturing Corporation \$ 961-26624- Mfg. Name E1 Mfg. Part No.	* Dynaion	7.46 USD Add To Cart
S I Spectrum Chemical Manufacturing Corporation (1) By Supplier Class Certified Women Owned Business (1) S Discounted Price		Spectrum Chemical M Part Number System	Nanufacturing Corporation \$ 961-26624- Mfg. Name E1 Mfg. Part No.	* Dynaion	7.46 USD Add To Cart

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

â	TUmarketplace	All 💌 Search (Alt+Q)	۹ <u>14.92 USD</u> 📜	V 🔊 💶
	Simple Advanced	My Cart (Farrah's test order)		
ي م	Y Hide Search for products, forms, etc.	Quantity: 1 Price: 7.46 USD	View My Cart	Q
8	Search Results: 1	Quantity: 1 Price: 7.46 USD		тматен 👻
<u>ش</u>	By Supplier V Dynalon		14.92 USD	0

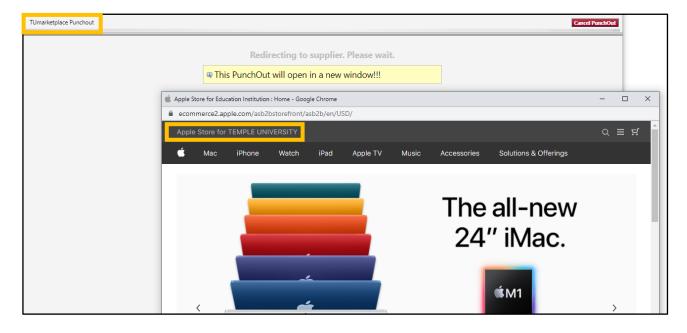
Placing a Punch-Out Order

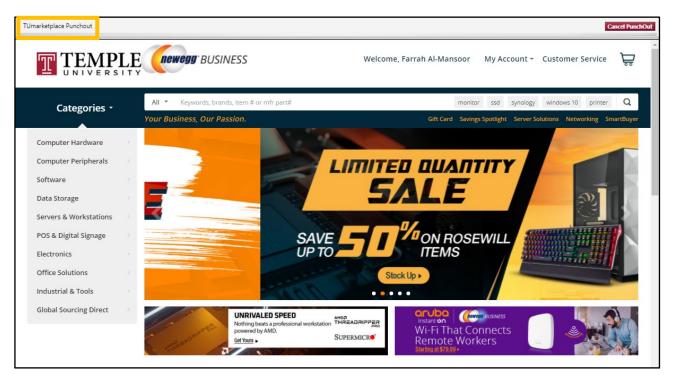
Purpose: In TUmarketplace, you will notice a selection of punch-out vendors with a link to their website. Punch-out vendors are those that host their own catalogs, but provide special pricing for Temple University users. Note: Clicking on a punch-out supplier will take you to that vendor's website, but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

TUmarketplace				ch (Alt+Q) Q	14.92 USD 📜	
Simple Advanced	Go to: Non-Catalog	Item Favorites Fo	orms Shop Quick	Order Browse: Sup	opliers Categories	Contracts Chem
Search for products, suppliers, forms, part number, etc.						
CDC recommendations for hand hygiene are to wash with soap and water for at least 20 seconds. If soap and water are not readily available, use an alcohol-based hand sanitizer with at least 60% ethyl alcohol (ethanol) or 70% isopropyl alcohol	PO Change Request Form	Fleet Card Application	Temple University OWLtech Electr			
(isopropanol). Although hand sanitizers containing benzalkonium chloride are approved by the FDA, they are not recommended by the CDC as being effective against COVID-19. Please check the	Punch-out					
product label before purchasing. The Supplier Diversity database is a comprehensive listing of Temple's minority-owned, woman-owned, veteran-owned, and small business	EMSCO EMSCO / Fisher Scientific	E&I Pricing -Preferred	Scientific Preferred Supplier	MBE/ WBE and E&I Pricing	Imperial Bag & Paper Accommodation Mollen	Airgas
vendor partners. Use the site to find a vendor who can provide the services and/or products to meet your needs while supporting Temple University's commitment to diversity. https://uportal.temple.edu/web/home.community/divsup	GuyBrown OFFICE SUPPLIES	é	BH	CDWG	D¢LL	Connection NCPA Pricing
Beginning the week of August 10th Jaggaer will be upgrading their search functions within TUmarketplace. The changes for this upgrade are significant. To assist in training and navigating the	MBE/ WBE					
new search features, Purchasing Services has provided step-by-step instructions and screen shots.	RUMSEY Harrison and a	TU Software Site Licenses	newogg Business-	Graybar U. S. Communities Pricing		McMASTER-CARR.
ORDERING PROCEDURES FOR EMPLOYEE AND STUDENT MASKS For information on how to request masks for Employees and Students, please go to https://www.temple.edu/purchasing. Instruction	GRAINGER Hardware & Materials (E&I)	HINNY SCHEIN*	Mck	NEOLINE	Cupli dba: Matt Industries	BIORAD
are located under "Order Placement Guidance during COVID-19 restrictions"	CAROLINA PA Costars Pricing	QIAGEN	n <mark>o</mark> c	Lenovo	Thermo Fisher	
To process requests for Apple products and office supplies to be shipped off campus,						

- 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.





- 4. 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.
- 5. 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.

TUmarketplace Punch	hout								Cancel PunchOut			
newegg	g [•] BUSINESS			Welcom	ne, Farrah Al-N	lansoor My	Account - C	ustomer Servic	e 🚽			
Categ	gories *	eywords, brands, item # or mfr p ness, Our Passion.	part#		Gift (ard Savings Spot	light Server Soluti	ions Networking	Q SmartBuyer			
Home > My Si												
My Shoppin	ig cart						1 Item(s):		\$245.99			
Enter Item # (e.g.	. 9B-12-345-678) or Mfr. Part #	ty. 🐥 Add		Û F	Remove All	≓ Move All to	Grand Tota		245 ^{.99}			
NeweggBusi	iness Marketplace Direct Deli	ivery Service 😡						CHECKOUT				
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	Shopping Cart 👻	_									۲	۰
5	Simple Advanced								Details			~
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섊	Description								Total			USD
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er C	Internal Note											_
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	Contract	PON	lumber									
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	Need to make changes? MO • Xu Yuan Jia-Shop Multi-Fur Home and Office Projector	nction Stand Wall Projector M					ng, Black Projec	ctor Stand for				
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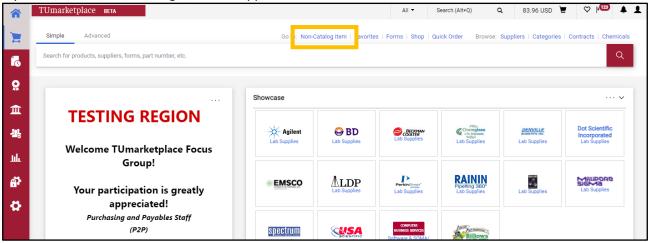
6. Review your shopping cart in TUmarketplace and then finalize your order by clicking "Proceed To Checkout". If you need to modify or view your items, click on the corresponding buttons above the item's product description, and you will be taken back to the vendor's punch-out site.

Priority	Normal	•								_
Internal Note	1000 characters remaining	expand clear						Details For Farrah Al-Mansoor Estimate (245.99 USD)		~
1 Item							· ·	Subtotal	245.99 245.99	USD
Newegg Business Inc	· 1 Item · :						…	Proceed To		
	isiness 1 : 175 owland Stre	et, City of Industry,	California 91748-1	114 United States	\$			Assign	Cart	
Contract	РО	Number								
no value	To	Be Assigned								
Need to make chances? N • Xu Yuan Jia-Shop Multi-F Home and Office Projecto	unction Stand Wall Projector					ting, Black Projec	tor Stand for			
Item		Catalog No.	Size/Packa ging	Unit Price	Quantity	Ext. Price				
Projector Mount Brac	lti-Function Stand Wall ket with Adjustable	9SIV0PCE KH5619	EA	245.99	Qty: 1 EA	245.99	🗌			
∧ ITEM DETAILS ♦										

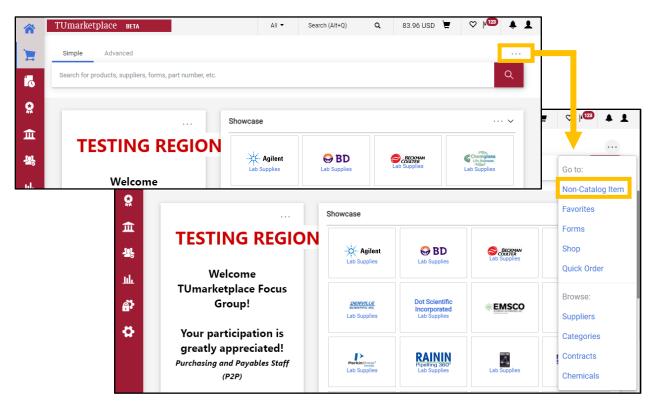
Placing a Non-Catalog Order

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.

Add Non-Catalog Ite	m						×
Existing Supplier	Manual Supplier Suppli	er Not Known					
Select Supplier		۹					
Item							~
Description *	Catalog	No. Size	Quantity ★	Price	Packag	ing ★	
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254 characters remaining	11						
Additional Details							~
Commodity Code	Q	Manufacturer Name					
Manufacturer Part No							
Add Internal Attachm	ents						~
Add Internal Attachmen	ts						
★ Required fields					Save	Save And Add Another	Close

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.

4. 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.

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í.	Π	Search for products, suppl	iers, forms, part number, etc.	Details			~				
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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.

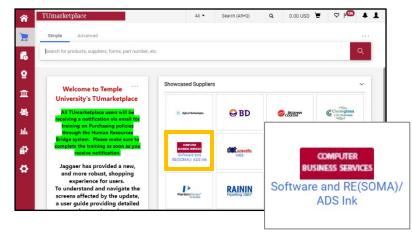
Methods of Purchasing Software:

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

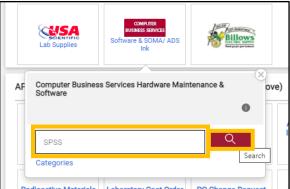
1. Computer Business Services (CBS) Showcase Supplier Catalog

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

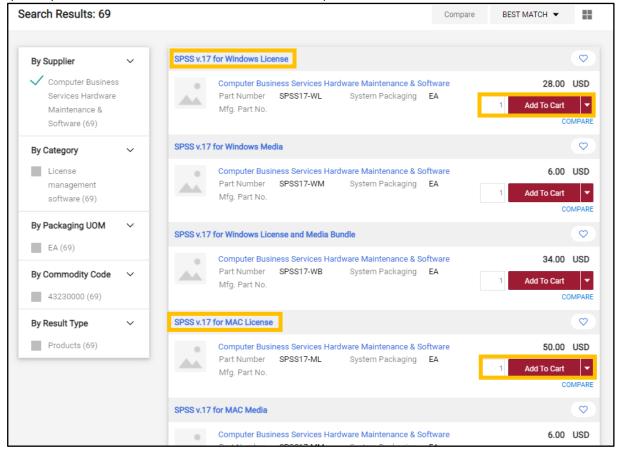
- 1.1. Log in to TUmarketplace.
- 1.2. Click on the CBS catalog.



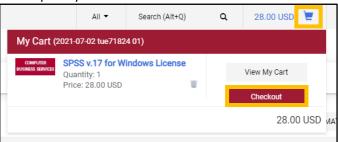
1.3. Type "SAS" or "SPSS" into the search field that appears, then click on the magnifying glass.



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 inclue 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".

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ters, Sample pa	ick					
orporation \$	wee *					42.87 USD
		Mfg. Name Mfg. Part No.	DynaMed Products 80091		1	Add To Cart

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".

^	TUmarketplace		
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	Shopping	View Carts	
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ш			ackaging 30PC, CS
<u>a</u> r			lene Graduated Tri-Stir Beakers, 50 I
\$			Chemical Manufacturing Corporati ber 140-52714-P5 ackaging 100PC, CS
	Lab Bottles (7)		
	Centrifuge Tubes (6)	Dyn-A-Med Polyprop	ylene Graduated Tri-Stir Beakers, 250

1.2. From your shopping cart, click "Proceed To Checkout".

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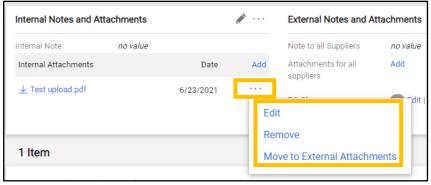
1.3. You will be taken to the draft requisition, where you can add internal and external notes and attachments. Internal notes and attachments are viewable by Temple administration only; external notes and attachments which will go to the vendor with the purchase order.

Requisition - : 3281421									۲	•
Summary PO Preview Comments	Attachments Hist									
		order status informat	ion:		A second s					
		Order Contact Area C	ode no value		Accounting Date	no value		Draft		
		Order Contact Phone xxxx)	(xxx- no value					Total (48.11 USD)		~
		Order Contact Email	no value					Subtotal		48.11
		Delivery Options						Place Order		48.11
		Ship Via	Best Carrier-Best Wa	ву	TPCard (<\$5K)			Assign Cart		
Accounting Codes							ø v	What's next for my order? Next Step WaitForPRApprovals		~
Chart Fund	Or	ganization	Account	Program	Activity	Location		Approver Marshall, Andrew		
T 10000 Temple University Operation			7200 General Supplies	06 Institutional Support	no value	no value		Workflow		÷
Internal Notes and Attachments	<i>"</i> .	··· External Notes and	d Attachments	ø	Purchasing Use Only		ø v	Oraft Active Farrah Al-Mansoor		
Internal Note no value		Note to all Suppliers	no value		Buyer Name (for Purchasing Dept Only)	no value				
Internal Attachments Add		Attachments for all suppliers	Add		Send to Bid	no value		+ Parallel Steps Click to view		
		PO Clauses	Edit View deta	ils	Close PR?	no value		Initial Budget Authorization		
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1 Item								Level 4 Approval-2 Future		
Spectrum Chemical Manufacturi	ng Corporation · 1 Iter	n · 48.11 USD					🗆	+ Parallel Steps		

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.

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Internal Notes and At	no value	Date /	External Notes and	d Attachments no value	<i>d</i> i	

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 requsition:
 - 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.

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2	Submitted		General University -Se	•	1852 N. 10th Stree	et (082-11)					129.39
	6/23/2021 11:26 AM		Broad & Montgomery PHILADELPHIA, PA 1		1st floor, TASB Philadelphia, PA 19	9122					
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	2021-06-23 tue71824 02									-	

2.3. Click the plus icon to add a comment.

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-225				_		129.39	
ш					What's next?	~	
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2.4. Click "Choose File" to select and add your attachment.

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ADD COMMENT				/ ×		Subtotal			129.39
	This will add a comment to the doc receive an email indicating that a c document. Email notification(s) Add recipient	omment has	been added to			What's ne Workflow			129.39 ~
1000 characters remaining expand I clear	Farrah Al-Mansoor (Preparet <farrah@temple.edu> Attach file (optional) Attachment Type File File Name</farrah@temple.edu>	d by, Approve	*			\bigcirc	Farrah Al-	1 11:26 AM	
No comments have been added	File Choose File	e Uplo	ad your file			-(-		Validation 1 npleted	•••
					_	-6	Wa	itForPRAppro	ovals · · ·

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

ADD COMMENT	\checkmark \times
Adding test attachment to this requisition per your request.	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)
940 characters remaining expand clear	<farrah@temple.edu> Attach file (optional)</farrah@temple.edu>
	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	\checkmark \times
Adding test attachment to this requisition per your request.	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.
940 characters remaining expand clear	Email notification(s) Add recipient Farrah Al-Mansoor (Prepared by, Approved) <farrah@temple.edu> Greenberg, Naomi <naomi.greenberg@temple.edu></naomi.greenberg@temple.edu></farrah@temple.edu>
	Attach file (optional) Attachment Type Image: File Image: Link/URL File Test attachment Test upload.pdf

2.7. Click the check mark to submit your attachment.

ADD COMMENT	×
Adding test attachment to this requisition per your request.	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
940 characters remaining expand clear	Farrah Al-Mansoor (Prepared by, Approved) <farrah@temple.edu> Greenberg, Naomi <naomi.greenberg@temple.edu> Attach file (optional)</naomi.greenberg@temple.edu></farrah@temple.edu>
	Attachment Type File Link/URL
	File Name Test attachment
	File Choose File Test upload.pdf

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

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6	Summary PO Preview Comments O Attachments	History			
õ	Records found: 1	Show comments for Requisiti	on • +	Pending Total (129.39 USD)	~
血	Farrah Al-Mansoor - 6/30/2021 12:17:42 PM	Requisition - 3281361	Comment Added	Subtotal	129.39
<u>48</u>	Adding test attachment to this requisition per your request. Email sent: Naomi Greenberg <naomi.greenberg@temple.edu></naomi.greenberg@temple.edu>				129.39
Jul.	Attachment Added: 👤 Test attachment			What's next?	~
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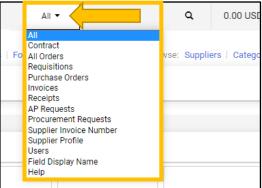
Using Quick Search to Find a Requisition, Receipt, or Purchase Order

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.

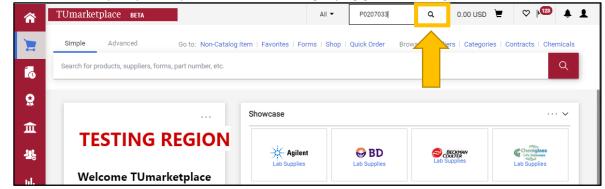
- 1. Log in to TUmarketplace.
- 2. Enter the relevant information in the search field at the top of the page. You will need to know at least part of the number that you are searching.

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1	Simple Advanced Go to: Non-Catalog Item Favorites	Forms Shop	Quick Orde	vse: Supplier	s Categories	Contracts Chem	icals
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Q	Showcase						~
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쟶			BD	Courses Courses	CKMAN JER oplies	Cherglass Ule Sciences Lab Supplies	
ul.	Welcome TUmarketplace						

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.



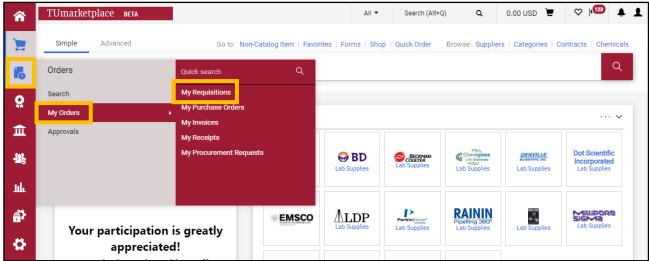
5. If multiple options match your search, a list of them will appear; select the one you wish to view by clicking on it. Otherwise, if there is only one possible match, you will be taken directly to the appropriate page. Note that if you do not select a specific document type, related documents will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

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	<u> 112</u>	Revision No.	0				Workfl	ow		Completed			
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	յլի	Purchase Order Date Total	1/15/2015 150.966.80						me	thod(s) indicated belo	w the last tim		
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	A	Owner Phone	+1 215-926-2010				Distrib	ution Dat		15/2015 9:16 AM			
		Owner Email	theresa.burt@temple.e	du			Supplie			nt To Supplier			
	ö	Requisition Number	1275416 view print										
	. .	Internal PO Ref #:	1560922										
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		Product Desc	tription		Catalog No	Size / Packagi		Unit Price	Quantity	Ext. Price	Receiving	Invoicing	Matching
		1 🗸 Test 3 🍺 🖷	ore info			TEST 1/EA		300.00	500 EA Add discour	150,000.00 USD nt	Fully Received	Fully Invoiced	Fully Matched
		2 🗸 Testing invoid	ing 4 📴 more info			1/EA		20.50	32 EA Add discour	656.00 USD	Fully Received	Fully Invoiced	Fully Matched
		3 ✓ testing invoic	ing 🎦 more info			2/EA		12.95	24 EA Add discour	310.80 USD	Fully Received	Fully Invoiced	Fully Matched
	٩		nd Tax charges are calculat ecking, and workflow appro		ed by each su	upplier. The	e values	shown h	ere are for e	stimation Total	ş	150,9 See configura	66.80 USD

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.

^	TUmarketplace BR					All 🔻	Search (Alt+Q) Q	0.00 USD 📜 🤤	♥ 123 ▲ L
1	■ My Requisition						🛱 Save As 🔻	🖈 Pin Filters 👻	Export All
6	Quick Filters My Sear	ches	mitted Date: Last 90 days				۹.	Add Filter - Clear	r All Filters
o €	Supplier Temple Purchasing	8	pared For: Al-Mansoor, Fa. 1-9 of 9 Results	* X					🌣 20 Per Page 👻
	Guy Brown Management LLC	1 v More	Requisition Number 🔻	Supplier	Requisition Name	Requisitior Status 🔻		Submitted Date 오	Total Amount 🔻
հե	Requisition Status	~	3258109	Guy Brown Management LLC	2021-04-28 tue71824 01	Pending	Farrah Al- Mansoor	6/22/2021 9:39:46 AM	15.00 USD
a 7	Pending Department	9	3238262	Temple Purchasing	2021-04-06 tue71824 08	Pending	Farrah Al- Mansoor	4/14/2021 12:54:42 PM	5,000.01 USD
\$	No Department	9	3238261	Temple Purchasing 🛛	2021-04-06 tue71824 07	Pending	Farrah Al- Mansoor	4/6/2021 11:26:21 AM	5,000.01 USD
	Prepared By	Ő	3238260	Temple Purchasing 🛛	2021-04-06 tue71824 06	Pending	Farrah Al- Mansoor	4/6/2021 11:24:51 AM	5,000.01 USD
	Current Workflow Step	~	3238208	Temple Purchasing 🕲	2021-04-06 tue71824 05	Pending	Farrah Al- Mansoor	4/6/2021 11:22:58 AM	5,000.01 USD
	Level 3 Approval-1 Level 4 Approval-2	7 0	3238259	Temple Purchasing 🕲	2021-04-06 tue71824 04	Pending	Farrah Al- Mansoor	4/6/2021 11:21:58 AM	5,000.01 USD
م	Purchasing Review	More	3238255	Temple Purchasing 🛛	2021-04-06 tue71824 03	Pending	Farrah Al- Mansoor	4/6/2021 11:20:38 AM	5,000.01 USD

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

TUmarketplace	BETA				All 🔻 Searc	h (Alt+Q) Q	0.00 USD 📜 🤇	≫ № 🌲 .
Orders > Search > Requisition	ins							-∜Ū Lo
\equiv My Requisit	ions					Save As	🖈 Pin Filters 💌	🛎 Export All 🔹
Quick Filters My Sea	rches	Submitted Date: Last 90	days 🔻 Quick search			٩	Add Filter ▼ Clean	All Filters
Supplier	~	Prepared For: Al-Manso	oor, Fa 🔻 🗶					
Temple Purchasing	8	1-9 of 9 Results						20 Per Page
Guy Brown Management LLC	1 w More	Requisition Number 👻	Supplier	Requisition Name	Requisition Status 💌	Prepared For	Submitted Date 오	Total Amount
Requisition Status	~	3258109	Guy Brown Management LLC ④	2021-04-28 tue71824 01	Pending	Farrah Al- Mansoor	6/22/2021 9:39:46 AM	15.00 USE
Pending Department	9	3238262	Temple Purchasing O	2021-04-06 tue71824 08	Pending	Farrah Al- Mansoor	4/14/2021 12:54:42 PM	5,000.01 USE
No Department	9	3238261	Temple Purchasing	2021-04-06 tue71824 07	Pending	Farrah Al- Mansoor	4/6/2021 11:26:21 AM	5,000.01 USE
Prepared By	9	3238260	Temple Purchasing	2021-04-06 tue71824 06	Pending	Farrah Al- Mansoor	4/6/2021 11:24:51 AM	5,000.01 USE
Current Workflow Step	~	3238208	Temple Purchasing 🖲	2021-04-06 tue71824 05	Pending	Farrah Al- Mansoor	4/6/2021 11:22:58 AM	5,000.01 USE
Level 3 Approval-1 Level 4 Approval-2	7 0	3238259	Temple Purchasing 🖲	2021-04-06 tue71824 04	Pending	Farrah Al- Mansoor	4/6/2021 11:21:58 AM	5,000.01 USE
Purchasing Review	1 w More	3238255	Temple Purchasing 🛛	2021-04-06 tue71824 03	Pending	Farrah Al- Mansoor	4/6/2021 11:20:38 AM	5,000.01 USE

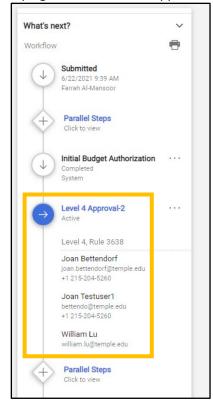
5. On the requisition page, the requisition's status and step in its workflow will show in the box to the right. The current step is indicated with an arrow in a blue circle.

Requisition - : 32	58109								I of 9 Results	• < >
Summary PO Preview	Comments Attachmen	nts History								
General		<i>"</i>	Shipping		<i>p</i>	Billing		ø v	Pending	
									Total (15.00 USD)	~
Status	C Pending Level 4 Approval-2		Ship To			Bill To				
Submitted	6/22/2021 9:39 AM		Room/Floor/Attn Farrah Al Department Purchasing Sv			Accounts Payable 215-926-2032			Subtotal	15.00
Cart Name	2021-04-28 tue71824 01		General University -See her Broad & Montgomery	ein		1852 N. 10th Street (082-1 1st floor, TASB	1)			15.00
Description	no value		PHILADELPHIA, PA 19122 United States			Philadelphia, PA 19122 United States			Assign To Myself	-
Priority	Normal								What's next?	~
Prepared by	Farrah Al-Mansoor		If you are a Reviewer, enter with order status informati	your information here	to be contacted	Billing Options			Workflow	•
			Order Contact Area Code	no value		Accounting Date	no value		Submitted 6/22/2021 9:39 AM	
			Order Contact Phone (xxx-	no value					Farrah Al-Mansoor	
			XXXXX)						+ Parallel Steps	
			Order Contact Email	no value					Click to view	
			Delivery Options						Initial Budget Authorization	
			Ship Via	Best Carrier-Best Wa	w	TPCard (<\$5K)			System	
					.,				Level 4 Approval-2	
Accounting Codes								ø v	ALLIVE	
Chart	Fund	Organiza	ition Accour	*	Program	Activity	Location		Parallel Steps Click to view	
т	100000	83000	7200		06	no value	no value		I	
Temple University	Operating Fund	Purchasin		Supplies	Institutional Support				Second Budget Authorization	
Internal Notes and Atta	chments	ø ····	External Notes and Atta	chments	ø ····	Purchasing Use Only		ø v	Buyer Assignment	
Internal Note	no value		Note to all Suppliers	no value		Buyer Name (for Purchasing Dept Only)	no value		Future	
Internal Attachments	Add		Attachments for all suppliers	Add		Send to Bid	no value		Create PO	
			PO Clauses	2 Edit View deta	ils	Close PR?	no value		Future	
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1 Item								Π	Poloie	
								L .		

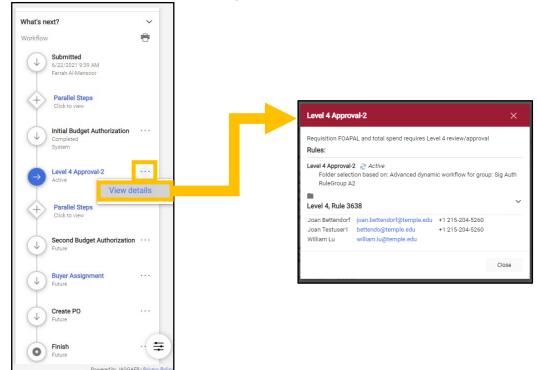
- 6. Some steps are hyperlinked you can click on them to bring up more information:
 - 6.1. Some steps occur in parallel. Click on the "Parallel Steps" link to view the steps.

Parallel Steps are a group of workflow step	s that are executed				
simultance busy. Offentimes, these steps an number of actions to take place at the sam differentiated from other workflow steps a diamond.	e automated and allow a large e time. Due to this, they are		Winat Sine Workflow	Submitted	
Submitted 6/22/2021 9:39 AM Farrah Al-Mansoor			€	6/22/2021 9:39 AM Farrah Al-Mansoor Parallel Steps Click to view	
Start - Parallel Steps PR Validation 1 Completed				Initial Budget Authorization Completed System	
WaitForPRApprovals Approved			⇒	Level 4 Approval-2 Active Parallel Steps Click to view	
Initial Budget Authorization Completed System		ø v		Second Budget Authorization	1
Level 4 Approval-2 Active			÷	Buyer Assignment Future	
Start - Parallel Steps		ø v		Create PO Future	

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.



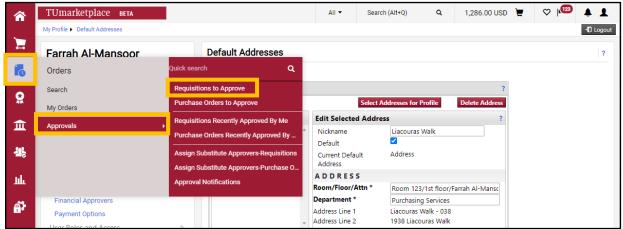
7. You can request to expedite some steps. If expediting is an option, it will appear when you click on the three dots next to the step. Add a reason, and then click "Expedite."

What's next?	~		
Workflow	0		
Submitted 6/22/2021 9:39 AM Farrah Al-Mansoor		Add Note ×	
Click to view		Click the Expedite button to expedite to the selected workflow step. By expediting to the selected workflow step, the document will by pass the following required steps: WaltForPRApprovals2	
Initial Budget Authorization Completed System		Expedite reason Required for event scheduled for 8/3.	
Active		963 characters remaining expend I clear Characters beyond the limit are not saved, i.e., the note is truncated. Once the note is attached, it is accessible from the History tab of the document.	
Click to view		Expedite	
Second Budget Authorization			
Buyer Assignment Future View de	etails		
Create PO Future	e		
Finish Future			

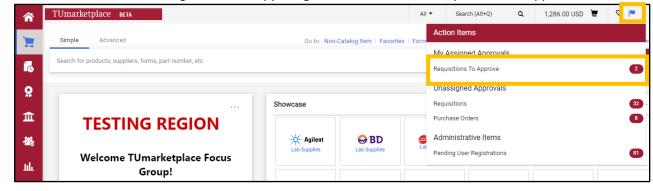
Approving a Purchase Requisition

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 Foun	d: 2		All Da	ites		Assign	✓ Go
		So	ort by: Submit date nev	west first	•		?
Hide requisition details	🖴 expand all 🛛 🖾 collapse all					Results per	folder: 20 💙
🔺 🖴 My PR App	orovals [2 results]						
Requisition No.	Suppliers:	Assigned Approver	PR Date/T	ime	Requisitioner	Amount	Action
🐮 21291 <mark>1</mark> 🔍	v 🛛 🖉 🛞	Farrah Al-Mansoor	1/18/2018 9:23 AM		Donna Schweibenz	3,447.90 USD	Approve
Requisition Name	2018-01-18 donnas 03		🛅 Folders	0 Days in fold	er [My PR Approvals]		
No. of line items	2			52 Days in fol	der [Buyer Name (for Purchasing Dept C	Only): Farrah Al-Mansoor: (All V	/alues)]
<i>2</i> 933272 🖻	Alpha DNA	Farrah Al-Mansoor	3/5/2013 10:32 AM		Rahkeeta Rogers	85,000.00 USD	Approve
Requisition Name	2013-03-05 rahkeeta 02		🔚 Folders	0 Days in fold	er [My PR Approvals]		
No. of line items	1			3030 Days in	older [High Dollar Contract Purch]		

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

Document Navigator Display	,					VOODOD LAITALI	? X
							Print Close
		<u><f< u=""></f<></u>	Previous 16 of 31 Ne	<u>kt></u>			
Requisition Summary	- <u>2309093</u>						Assign Approve
	General		Shipping			Billing	
Status Submitted Cart Name Description Priority Prepared by	Pending Contract Buyer Assignment 6/28/2018 11:23 AM 2018-06-28 donnas 02 Normal Donna Schweibenz	Ship To Room/Floor/Attn 8th Fl/D Schweibenz Department Purchasing Carnell Hall 1803 N. Broad Street PHILADELPHIA, PA 19122 United States If you are a Reviewer, en order status information Order Contact Area Code no value Delivery Options	-6095 ter your information here	to be contacted with 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	
		Ship Via	Best Carrier-Bes	Way	т	PCard (<\$5K)	
			Accounting Codes		1		
Chart	Fund	Organization	Account	Program	Activity		Location
T Temple University	100000 Operating Fund	83000 Purchasing Main	7200 General Supplies	06 Institutional Su	no value		no value
Internal I	Notes and Attachments	Exte	rnal Notes and Attachr	ients	Purc	hasing Use Only	
Internal Note Internal Attachments	no note	Note to all Suppliers Attachments for all suppli PO Clauses 000002 Vendor Payment Inform	no note ers Temple Terms and ation Methods of Payme		Buyer Name (for Purchasing Dept Only) Send to Bid Close PR?	no value no value no value	
			Close				

5. 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.

Summary PO Preview Co	mments Attachments History		
General 💉 ···	Shipping 💉 ···	Billing 💉 ··· 🗸	Pending
Status	Ship To	Bill To	Total (300,500.00 USD)
Pending Contract Buyer Assignment	Room/Floor/Attn 8th Fl/Donna L. Schweibenz	Accounts Payable 215-926-2032	Subtotal 300,500.
Submitted 5/28/2018 11:23 AM	Department Purchasing Carnell Hall	1852 N. 10th Street (082-11) 1st floor, TASB	300,500.
	1803 N. Broad Street	Philadelphia, PA 19122	Assign To Myself
cart Name 1018-06-28 donnas 02	PHILADELPHIA, PA 19122-6095 United States	United States	What's next?
escription		Dilling Options	
o value	If you are a Reviewer, enter your	Billing Options	Workflow
Priority Normal	If you are a Reviewer, enter your information here to be contacted with order status information:	Accounting Date 6/23/2018	Submitted 6/28/2018 11:23 AM
lonnar	Order Contact Area Code		Donna Schweibenz
repared by	no value		
onna Schweibenz	Orden Orantant Dhanna (uuru		Spend Over Contract Review
	Order Contact Phone (xxx- xxxx)		Notification Sent
	no value		
			Fiscal Year End
	Order Contact Email no value		Donna Schweibenz

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

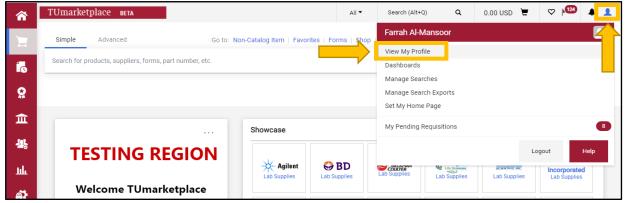
equisition - : 2309093			۰ 🖶
Summary PO Preview Com	nents Attachments History		
General 💉 ···	Shipping 💉 ···	Billing	Pending
itatus Pending	Ship To	Bill To	Total (300,500.00 USD)
ontract Buyer Assignment	Room/Floor/Attn 8th Fl/Donna L. Schweibenz	Accounts Payable 215-926-2032	Subtotal 300,500.
Submitted 5/28/2018 11:23 AM	Department Purchasing Carnell Hall	1852 N. 10th Street (082-11) 1st floor, TASB	300,500.
Cart Name 2018-06-28 donnas 02	1803 N. Broad Street PHILADELPHIA, PA 19122-6095 United States	Philadelphia, PA 19122 United States	Assign To Myself
escription		Billing Options	Approve Workflow
<i>no value</i> Priority	If you are a Reviewer, enter your information here to be contacted with order status information:	Accounting Date 6/23/2018	Submitted 6/28/2018 11:23 AM
Iormal Prepared by	Order Contact Area Code no value	0, 20, 2010	Donna Schweibenz
ionna Schweibenz	Order Contact Phone (xxx- xxxx)		Spend Over Contract Review
	no value		Fiscal Year End
	Order Contact Email no value		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. <u>Creating your approval PIN</u>:

- 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".

Farrah Al-Mansoor		User's Name, Phone	e Number, Email, etc.
User Name tue71824		First Name	Farrah
		Last Name	Al-Mansoor
User Profile and Preferences	<	PHONE NUMBER is a	
User's Name, Phone Number, Email	l, etc.	REQUIRED field. Please	International phone numbers must begin with +
Language, Time Zone and Display S	Settings	enter your work number	International phone numbers must begin with +
App Activation Codes		and then click SAVE *	
Early Access Participation		Mobile Phone Number	
Guided Tour Instructions		Mobile Filone Number	
Update Security Settings	<		International phone numbers must begin with +
Change Email Approval Code		E-mail Address *	farrah@temple.edu
Default User Settings	>	Department	✓
User Roles and Access	>		•
Ordering and Approval Settings	>	Authentication Method	SAML 🗸
Permission Settings	>	User Name *	tue71824
Notification Preferences	>	User Name ^	tue/1624
User History	\$		
Administrative Tasks		★ Required	

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."

mbe	rs must begin with +		
	Change Email Approval Code	×	
	Email Approval Code		
	Save Changes	Close	Sa

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

^	TUmarketplace вета	All - Search (Alt+0)	٩	0.00 USD 📜	♡	4 1
	My Profile > User's Name, Phone Number, Email, etc.	Success Email Approval Code Updated Successfully				- D Logout
-	Farrah Al-Mansoor	User's Name, Phone Number, Ema		2		
i c	User Name tue71824	First Name Farrah				

- 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.

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	pproval Request for Requisition≢			
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Parkys, September	in consistent plant feature and to be a starting part of the part of the feature of the data of the start of the			

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	2 BETA	
Pomulaiti 200	2052		
Requisitions: 328			
Owner:	Farrah Al-Mansoor		
Total: Discount:	1,889.00 USD 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:		omputer Business Services Hardware Main	intenance & Software
Assigned To:	Not Assigned		
> Shipping			
> Billing			
> TPCard (<\$5K)			
> Accounting Code	es		
> Internal Notes ar	nd Attachments		
> External Notes a	nd Attachments		
> Line Items			
			2
> Other Approvers	5		2
Actions			
Approval Code *			
Required			
Comment			
0	Assign t	o myself	
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		ourbhuid.	000 000
		Handling:	0.00 USD
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		> Accounting Codes	
		> Internal Notes and	Attachments
		> External Notes and	Attachments
		> Line Items	
		> Other Approvers	

# 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.

*	TUmarke	tplace вета			All 🔻	Search (Alt+Q	) Q	83.96 USD 🍹	. 0 .	123	1
1	Simple	Advanced	Go to: Non-Catalog Item	Favorites	Forms   Shop	Quick Order	Browse: Supp	oliers   Categories	Contracts	Chemicals	S
5	lab coat								>	k Q	
<b>e</b>				o1							

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.

Part Number     10830-658 (EA)     Mfg. Name     SUPERIOR UNIFORM GROUP       Add Favorite     Vide Decision     Wide Decision     Vide Decision       Edit Item Details     VWR International Incorporated, Catalog No. 10830-658 (EA)     Image: Catalog No. 10830-658 (EA)     Image: Catalog No. 10830-658 (EA)       Item Nickname *     LAB COAT MICRSTAT SHT 4XL 424-4X     Image: Catalog No. 10830-658 (EA)     Image: Catalog No. 10830-658 (EA)	oduct Flag 🗸	LAB COAT MICRSTAT SHT 4XL 424-4XL Unisex Microstat ESI material. 76cm long. Features pocket access slits snap front coded ha			
Select Destination Folder     Personal     Select Destination Folder     Personal     Yuk have no personal favorites.     Shared     Company Forms   Company Transfer with Japan   Inter Company Transfer with Japan   Timple Favorites	Supplier V		Mfa Nomo		Check Availability
Add Favorite C     Edit Item Details     VWR International Incorporated, Catalog No. 10830-658 (EA)     Item Nickname *     LAB COAT MICRSTAT SHT 4XL 424-43     Quantity *     1     Description     Solid characters remaining     Select Destination Folder     Personal   You have no personal favorites.   Shared   Company Forms   Controller's Office   HR Benefits Forms	S I aboratory	Part Number 10630-038 (EA)	Mig. Name		
Edit Item Details   VWR International Incorporated, Catalog No. 10830-658 (EA)     Item Nickname *   LAB COAT MICRSTAT SHT 4XL 424-4x   Quantity *   1   Description   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	Add Favorite			× Car	
Item Nickname * LAB COAT MICRSTAT SHT 4XL 424-4X   Quantity * 1   Description	Edit Item Details				
Quantity* 1   Description 500 characters remaining   Solo characters remaining th G   Select Destination Folder Create New    Personal    You have no personal favorites.    Shared    Company Forms Controller's Office   HR Benefits Forms HR G   HR Payroll Inner Company Transfer with Japan   Inner Company Transfer with Japan Inner Company Transfer with Japan	VWR International Incorporated	d, Catalog No. 10830-658 (EA)			Check Availability
Quantity* 1   Description 500 characters remaining   Select Destination Folder Create New    Personal    You have no personal favorites.    Shared    Company Forms    Controller's Office HR Benefits Forms   HR Payroll Inner Company Transfer with Japan   Temple Favorites Inner Company Transfer with Japan				mpan	
Description Sou 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 Herefore Former Cash Transfer	Item Nickname 🕈	LAB COAT MICRSTAT SHT 4XL 424-4>		carbo	
Select Destination Folder Create New     Personal   You have no personal favorites.   Shared   Company Forms   Controller's Office   HR Benefits Forms   HR Payroll   Inner Company Transfer with Japan   Temple Favorites	Quantity *	1		ble sr	
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	Description			IM GI	
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					
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 IIS Rark Laga Brograms Cash Transfer		500 characters remaining			
Personal       Image: Company Forms         Company Forms       Image: Controller's Office         HR Benefits Forms       Image: Controller's Office         HR Payroll       Inner Company Transfer with Japan         Temple Favorites       Image: Controller's Controller's Office	Select Destination Folder		Create New	xie sr	
Shared     M G       Company Forms     Image: Company Forms       Controller's Office     Image: Company Forms       HR Benefits Forms     Image: Company Transfer with Japan       Inner Company Transfer with Japan     Image: Company Transfer with Japan       Temple Favorites     Image: Company Forms Comb Transfer	Personal			~	
Shared          Company Forms          Controller's Office          HR Benefits Forms          Inner Company Transfer with Japan          Temple Favorites	You have no personal fa	avorites.		MA G	
Controller's Office HR Benefits Forms HR Payroll Inner Company Transfer with Japan Temple Favorites US Back L can Programs Cash Transfer	Shared				
HR Benefits Forms HR Payroll Inner Company Transfer with Japan Temple Favorites	Company Forms				
HR Payroll Inor Inner Company Transfer with Japan Inner Company Transfer with Japan Inner Company Transfer With Japan Inner Company Transfer Inner Company Transfer Inner Company Transfer Inner Company	Controller's Office				
Inner Company Transfer with Japan Temple Favorites US Back - Loag Reograms Cash Transfer	HR Benefits Forms			dinor	
Temple Favorites US Park - Loan Programs Cash Transfer	HR Payroll			leng	
US Bank - Loop Brograms Cash Transfer	Inner Company Transfer	r with Japan			
US Bank - Loan Programs Cash Transfer	Temple Favorites				
	US Bank - Loan Program	ns Cash Transfer		-	

- 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.

Add Favorite			×	
Edit Item Details				Â
VWR International Incorporated, Catalo	g No. 10830-658 (EA)			1
1				
Item Nickname *	4xl lab coats			l
Quantity 🗯	5			l
Description	LAB COAT MICRSTAT SHT 4XL 424-4XL U CoatMade of polyester/cotton/1% carbon material. 76cm long. Features pocket acc	-suffused nylon grid		l
	261 characters remaining	· · ·		
		Create	New 💌	I
Select Destination Folder				
Personal			*	
You have no personal favorites.				
Shared			~	
Company Forms				
Controller's Office				
HR Benefits Forms				
HR Payroll				
Inner Company Transfer with Ja	apan			
Temple Favorites				
US Bank - Loan Programs Cash	Transfer			-
* Required		Save Changes	Close	

- 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.

it Item Details		
/WR International Incorp	orated, Catalog No. 10830-658 (EA)	mpare
m Nickname 🕇	4xl lab coats	carbon-suffu
antity *	5	ble snaps at v
scription	LAB COAT MICRSTAT SHT 4XL 424-4XL Unisex Mict	Top level personal folder
	CoatMade of polyester/cotton/1% carbon-suffused material. 76cm long. Features pocket access slits s	Top level shared folder
lect Destination Fol	material. 76cm long. Features pocket access slits s	Subfolder of selected folder
lect Destination Fol	material. 76cm long. Features pocket access slits s	Subfolder of selected folder
	material. 76cm long. Features pocket access slits s 261 characters remaining der	Create New  Create
Personal	material. 76cm long. Features pocket access slits s 261 characters remaining der	Subfolder of selected folder
Personal You have no perso	material. 76cm long. Features pocket access slits s 261 characters remaining der	Create New  Create
Personal You have no perso Shared	material. 76cm long. Features pocket access slits s 261 characters remaining der	Create New  Create
Personal You have no perso Shared Company Forms	der	Subfolder of selected folder
Personal You have no perso Shared Company Forms Controller's Office	der	Create New  Create
Personal You have no perso Shared Company Forms Controller's Office HR Benefits Forms HR Payroll Inner Company Tra	der nal favorites.	Subfolder of selected folder
Personal You have no perso Shared Company Forms Controller's Office HR Benefits Forms HR Payroll Inner Company Tra Temple Favorites	der nal favorites.	Subfolder of selected folder

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.

rite	Create Personal Fold	ler	×
Det	Name 🕈	Lab coats	
hati	Description	For Dr. Maury's lab.	
me		234 characters remaining	
			_
	★ Required	Save Changes	Close
	Co	atMade of polyester/cotton/1% carbon-suff	

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

Add Favorite				×		
Edit Item Details						
VWR International Incorporated, Ca	talog No. 10830-658 (E/	A)				
	alo	og Item   Favorites	Forms   Sho		SUCCESS	
Item Nickname 🕇	4xl lab coats				Successfully added to Fa	vorites
Quantity *	5			L		
Description	LAB COAT MI <u>CoatMade</u> of				Compare	BEST MATCH 👻
	material. 76cr H	T 4XL 424-4XL Unis tures pocket access	ex Microstat	D Lab CoatMade of po lapel collar 3 patch p	olyester/cotton/1% carbon-su ockets and adjustable snaps	at wrists. Color-
Select Destination Folder	hat	tional Incorporated	\$ 🖾 🛷 📠			Check Availability
Personal Lab coats	)er ol	10830-658 reging 11tem FA	3 (EA)	Mfg. Name Mfg. Part No	SUPERIOR UNIFORM GROUP	Order From
Shared				~		
Company Forms						
Controller's Office						
HR Benefits Forms			<b>_</b>			
HR Payroll			<b>_</b>			
Inner Company Transfer with	n Japan					
Temple Favorites						
US Bank - Loan Programs Ca	ash Transfer					
★ Required			Save Cha	nges Close		

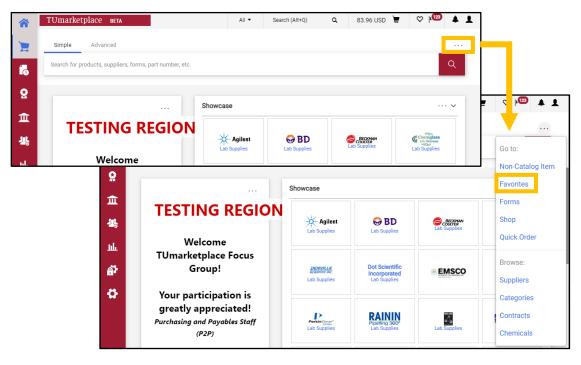
### 7. Favorited items will be indicated by a heart filled-in with blue.

earch Results: 2575	Compare B	EST MATCH 🔻
By Product Flag V	Lab coats	۲
➡ Hazardous material (15)       By Supplier     ✓       ➡ \$     ➡ Laboratory	VWR International Incorporated         Series         Mfg. Name         SUPERIOR UNIFORM GROUP           Part Number         10830-658 (EA)         Mfg. Name         SUPERIOR UNIFORM GROUP           System Packaging         11tem, EA         Mfg. Part No.         424-4XL	Check Availability
Disposable Products (21) S 🖉 😻 🌃 Grainger (949)	LAB COAT MICRSTAT SHT 5XL 424-5XL Unisex Microstat ESD Lab CoatMade of polyester/cotton/1% carbon-suffuse material. 76cm long. Features pocket access slits snap front lapel collar 3 patch pockets and adjustable snaps at we coded ha	
S 🛛 S 🖬 WWR International Incorporated (316)	VWR International Incorporated         \$ Z <> Mit           Part Number         10830-662 (EA)         Mfg. Name         SUPERIOR UNIFORM GROUP           System Packaging         1Item, EA         Mfg. Part No.         424-5XL	Check Availabilit
Spectrum Chemical Manufacturing Corporation (590)		Supplier COMPARI
Agilent Technologies	ECONOSHIELD LAB COAT LARGE. LEQ-43-L EconoShield ECX-500 Lab CoatConductive non-flaking and non-sloughin rate of fabric is 5000V to 500V in less than 0.1 seconds providing excellent static shielding. Mid-thigh length with a l	-

- 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.

T	Umarketplace BETA			All 👻 🤤	Search (Alt+Q) C	83.96 USD	
	Simple Advanced	Go to: Non-C	atalog Item Favorite	s Forms   Shop   Qu	uick Order Browse:	Suppliers   Categories	Contracts   Chemicals
5	Search for products, suppliers, forms, part number, etc.						Q
		Showcase					🗸
:	TESTING REGION						
	Welcome TUmarketplace Focus	Lab Supplies	BD Lab Supplies	Lab Supplies	Lab Supplies	Lab Supplies	Dot Scientific Incorporated Lab Supplies
	Group!						
	Your participation is greatly	* EMSCO		Perkin Umay' Lab Supplies	Pipetting 360° Lab Supplies	Lab Supplies	Lab Supplies
	appreciated! Purchasing and Payables Staff			СМРЛЕР			
			BCIENTIFIC		1 and the many		

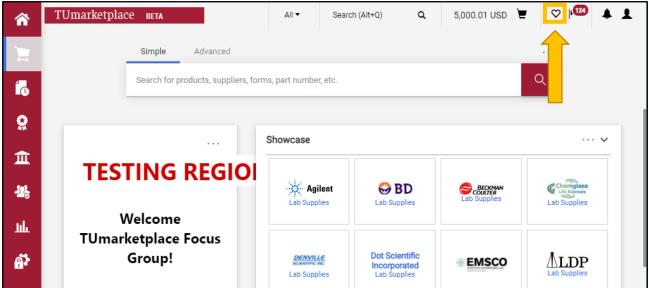
b. If your window is too small, you must click the three dots above the search bar, and then click the "Forms" link.



# 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.

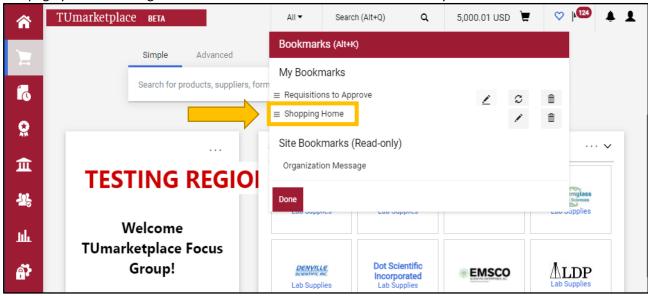
- 1. To add a bookmark:
  - 1.1. Log into TUmarketplace and navigate to the page you wish to bookmark.
  - 1.2. Click on the bookmark heart icon in the upper right-hand corner.



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

<b>^</b>	TUmarketplace вета	All 🕶	Search (Alt+Q)	۵	5,000.01 USD 📜	♡ 🕮 🛓 💄
	Simple Advanced	Bookmar	ks (Alt+K)			
t. To	Search for products, suppliers, form		marks ns to Approve		/ 0	÷
<b>e</b>			marks (Read-only)	)		🗸
血	TESTING REGIO	Done	-		Bookmark th	500 C
꽗		Lab Supp	<u> </u>		BECKMAN COULTER Lab Supplies	Lab Supplies
ш	Welcome TUmarketplace Focus					
<b>a</b> 7	Group!	DENVILI BORIMIEC Lab Supp	incorpo	orated		

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.

	TUmarketplace	BETA		All 🔻	Search (Alt+Q)	۹	5,000.01 USD 🗎	♡  × ¹²⁴	<b>1</b>
	Suppliers  Manage Supplier	rs 🕨 Search for a	Supplier						- DLogout
í.		Search					Go Advanced searc	:h	
			Enter sea	rch terms such	as Legal Company Name	e or Supplier	ID.	J	
<b>Q</b>								_	
Â									

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

	TUmarketplace вета		All 👻	Search (Alt+Q)	۹	5,000.01 USD 🗎	♡   ¹²⁴	• <b>1</b>
1	Suppliers  Manage Suppliers  Search for a Supplier		Bookmarl	ks (Alt+K)				- DLogout
1 1 0	Search	Enter sea		s to Approve				
¥ €			Site Book	marks on Message				
- <u>12</u> 5			Edit			Bookmark this	page	

- 3. <u>To rename a bookmark</u>:
  - 3.1. Click on the heart icon at the top right of the page and click "Edit" on the pop-up.

<b>^</b>	TUmarketplace BETA	All 🔻	Search (Alt+Q)	۵	5,000.01 USD 🗎 📜	$\heartsuit$	124	<b>1</b>
-	Suppliers  Manage Suppliers  Search for a Supplier	Bookmar	KS (Alt+K)					-D Logout
		My Bookr	marks					
Í.	Search Enter sea		ns to Approve					
<b>Q</b>		Shopping H	Home					
血		Site Book						
		Organizatio	on Message					
23		Edit			Bookmark this	page		

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

<b>^</b>	TUmarketplace вета	All 👻	Search (Alt+Q)	۹	5,000.01 USD 📜	♡ Þ	24 🔺 💄	
_	Suppliers  Manage Suppliers  Search for a Supplier	Bookmar	ks (Alt+K)				-D Logo	ut
		My Bookr	marks					
í.	Search		ns to Approve		2 0	â		
<b>O</b>	Enter se	$z \equiv Shopping$	Home		1	â		
		Site Book	marks (Read-only)					
血		Organizati	on Message					
-22,		Done			Bookmark this p	age		
a.l								

3.3. Type in the updated name in the textbox 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.

	TUmarketplace вета	All 🔻	Search (Alt+Q)	٩	5,000.01 USD 📜		$\heartsuit$	L.124	<b>1</b>
_	Suppliers  Manage Suppliers  Search for a Supplier	Bookmar	ks (Alt+K)						-D Logout
7		My Bookr	marks						
í.	Search		ns to Approve			C	ŵ		
<b>e</b>	Enter sea	^a ≡ Home			✓ Ø	C	â		
		Site Book	marks (Read-only)	1					
<u>ش</u>		Organizati	on Message						
-22,		Done			Bookmark th	is pag	e		
<u>luh</u>									

- 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.

TUmarketplace	BETA		All 👻	Search (Alt+Q)	۹	5,000.01 USD	Ħ	$\heartsuit$	124	<b>4</b> 1	L
Suppliers  Manage Supplie	ers 🕨 Search for a Supp	olier	Bookmar	ks (Alt+K)						📲 Logo	out
C			My Bookr	narks							
	Search		≡ Home				/ 0	â			
		Enter sea	≡ Requisitio	ns to Approve		(	20	ŵ			
			Site Book	marks (Read-only	)						
			Organizati	on Message							
			Done			Bookma	rk this pa	ige			
			Suppliers > Manage Suppliers > Search for a Supplier Search	Suppliers > Manage Suppliers > Search for a Supplier  My Bookman  Search  Enter set  Requisitio  Site Book  Organizati	Suppliers > Manage Suppliers > Search for a Supplier Search Bookmarks (Alt+K) My Bookmarks Enter see Requisitions to Approve Site Bookmarks (Read-only) Organization Message	Suppliers > Manage Suppliers > Search for a Supplier       Bookmarks (Alt+K)         My Bookmarks       My Bookmarks         Enter set       Requisitions to Approve         Site Bookmarks (Read-only)       Organization Message	Suppliers > Manage Suppliers > Search for a Supplier       Bookmarks (Alt+K)         My Bookmarks       My Bookmarks         Enter set       Requisitions to Approve         Site Bookmarks (Read-only)       Organization Message	Suppliers > Manage Suppliers > Search for a Supplier       Bookmarks (Alt+K)         My Bookmarks       Image Suppliers         Enter set       Requisitions to Approve         Site Bookmarks (Read-only)       Organization Message	Suppliers > Manage Suppliers > Search for a Supplier         Bookmarks (Alt+K)         My Bookmarks         Enter set         Enter set         Requisitions to Approve         Site Bookmarks (Read-only)         Organization Message	Suppliers > Manage Suppliers > Search for a Supplier         Bookmarks         My Bookmarks         Enter set         Requisitions to Approve         Site Bookmarks (Read-only)         Organization Message	Suppliers > Manage Suppliers > Search for a Supplier       Bookmarks (Alt+K)         My Bookmarks       Image: Search for a Supplier         Search       Image: Search for a Supplier         Enter set       Requisitions to Approve         Site Bookmarks (Read-only)       Organization Message

- 5. <u>To delete your bookmarks</u>:
  - 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.

	TUmarketplace вета	All 👻	Search (Alt+Q)	۹	5,000.01 USD 📜	$\diamond$	124	<b>4 1</b>
~	Suppliers  Manage Suppliers  Search for a Supplier	Bookmar	ks (Alt+K)					- Logout
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í.	Search	_ ≡ Home				;		
<b>Q</b>	Enter se	$a \equiv Requisition$	ons to Approve		10	; 💼		
ATA .		Site Book	marks (Read-only)					
血		Organizati	ion Message					
<u>-115</u>		Done			Bookmark this p	oage		
-26		Done			bookmark unis p	age		

# 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.

1	TUmarketplace вета		All 🕶	Search (Alt+Q)	۹	0.00 USD 📜	♡  124	4 1
	Simple Advanced Go to: N	Ion-Catalog Item   Favorites	Forms   Shop	Farrah Al-Manso	or			
	Search for products, suppliers, forms, part number, etc.			View My Profile				
1 C			•	Dashboards Manage Searches				
<b>Q</b>				Manage Search Exp	orts			
血				Set My Home Page				
		Showcase		My Pending Requisit	tions			8
<b>-2</b> 2,	TESTING REGION					Lo	igout	Help
Lik		1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	BD Lab Supplies		Supplies	scientific inc. Lab Supplies	Incorporate	
ត្តរ	Welcome TUmarketplace							

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.

	TUmarketplace вета		All 🔻	Search (Alt+Q)	۵	1,286.00 USD 📜	♡	<b>41</b>
	My Profile  User's Name, Phone Number, Email, etc.							-10 Logout
	Farrah Al-Mansoor	User's Name, Phone N	Number, Ema	iil, etc.				?
Í.	User Name tue71824	First Name	Farrah					
<b>e</b>		Last Name	Al-Mansoor					
	User Profile and Preferences	PHONE NUMBER is a	+1 215-204-61	45 ext.				
血	User's Name, Phone Number, Email, etc.	REQUIRED field. Please	International phon	ne numbers must begin w	ith +			
	Language, Time Zone and Display Settings	enter your work number and then click SAVE *						
- <u>11</u> 2	App Activation Codes							
	Early Access Participation	Mobile Phone Number						
հե	Guided Tour Instructions		International phon	ne numbers must begin w	rith +			
	Update Security Settings	E-mail Address *	from the second second	-				
<b>A</b>	Default User Settings 🛛 🐇	E-mail Address	farrah@temple.e	eau				
<u> </u>	Custom Field and Accounting Code Defaults	Department		~				
4	Default Addresses							
÷	Cart Assignees	Authentication Method	SAML	~				
	Checkout Settings	User Name *	tue71824					
	Financial Approvers	o del mante						
	Payment Options							
	User Roles and Access	★ Required					Save C	hanges
q	Ordering and Approval Settings						_	
4	Permission Settings							

#### 4. Click the "Select Addresses for Profile" button.

~	TUmarketplace вета			All 👻	Search (Alt+Q)	٩	1,286.00 USD	Æ	♡	<b>1</b>
_	My Profile      Default Addresses									1 Logout
	Farrah Al-Mansoor		Default Addresses							?
ĺo	User Name tue71824		Ship To Bill To							
<b>e</b>	User Profile and Preferences	•	Select an address to edit			Select Addre	? esses for Profile			
<b></b>	Update Security Settings	5	Shipping Addresses							
血	Default User Settings	<	Address	*						
<b>.</b>	Custom Field and Accounting Code De	faults								
	Default Addresses									
յլի	Cart Assignees									
	Checkout Settings									
្តារ	Financial Approvers									
3 4	Payment Options									
₽.	User Roles and Access	>		•						
·₩	Ordering and Approval Settings	>								
	Permission Settings	>								
	Notification Preferences	>								
	User History	>								
	Administrative Tasks	>								
Q										

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**.

Farrah Al-Mansoor		Default Addresses							
User Name tue71824		Ship To Bill To							
User Profile and Preferences	>	Select an address to edit	? Select Addresses for Profile						
Update Security Settings	- > - I	Shipping Addresses	Address Search						
Default User Settings	<ul> <li></li> </ul>	Address	Nickname / Address 1938*						
Custom Field and Accounting Code D	efaults		Text						
Default Addresses			Results Per Page 10 🗸						
Cart Assignees			Search						
Checkout Settings			Addresses Found: 2 💽 Page 1 of 1 💌						
Financial Approvers			Name Address						
Payment Options			O 118 Room/Floor/Attn Farrah Al-Mansoor						
User Roles and Access	- >		Department Triangle Apts						
Ordering and Approval Settings	- >		1938 N. Broad Street						
Permission Settings	- x -		PHILADELPHIA, PA 19122 United States						
Notification Preferences	- >		0 300 Room/Floor/Attn Farrah Al-Mansoor						
User History	- >		Department						
Administrative Tasks	>		Liacouras Walk - 038 1938 Liacouras Walk PHILADELPHIA, PA 19122 United States						

- 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** <u>before</u> 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.

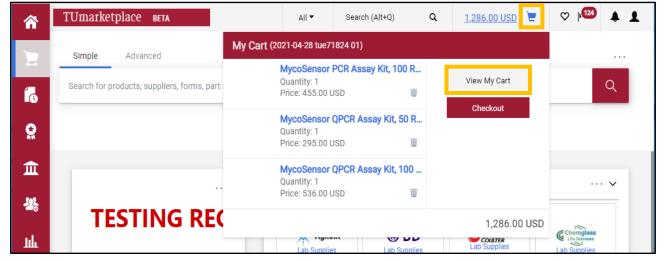
Farrah Al-Mansoor		Default Addresses				
User Name tue71824		Ship To Bill To				
User Profile and Preferences	>	Select an address to edit		Select	Addresses for Profile	Delete Addr
Update Security Settings	>	Shipping Addresses		Edit Selected Addre	255	
Default User Settings	<	Address	*	Nickname Default	Liacouras Walk	
Custom Field and Accounting Code D Default Addresses	efaults			Current Default Address	Address	
Cart Assignees				ADDRESS		
Checkout Settings				Room/Floor/Attn *	Room 123/1st floor,	/Farrah Al-Mans
Financial Approvers				Department *	Purchasing Services	
Payment Options				Address Line 1	Liacouras Walk - 038	}
User Roles and Access	5		-	Address Line 2	1938 Liacouras Walk	
Ordering and Approval Settings				City State	PHILADELPHIA PA	
2 2				Zip Code	19122	
Permission Settings	>			Country	United States	
Notification Preferences	>				Save	
User History	>					

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 <u>one</u> of the following:
  - 1.1. Click on the cart icon in the upper right-hand corner and choose "View My Cart".



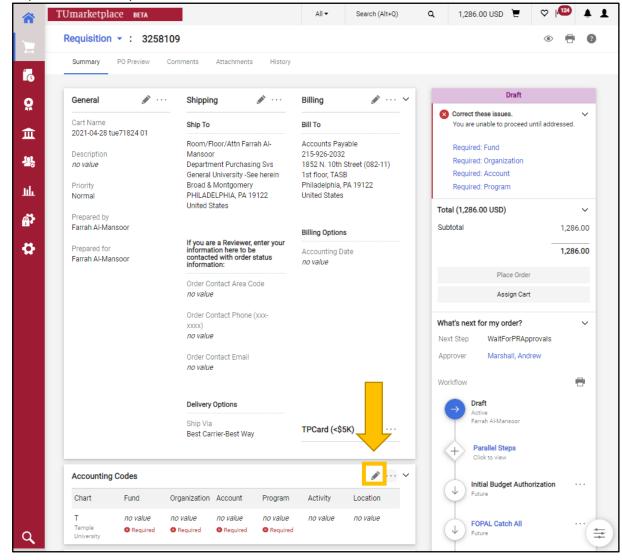
1.2. Hover over the cart icon on the far left of the screen, and then hover over "My Carts and Orders". Choose "Open My Active Shopping Cart".

*	TUmarketplace вета	All 🗸	Search (Alt+Q)	۵	0.00 USD		122 🔺 🕹
1	Shop (Alt+P)	Open My Active Shopping Cart					
íð	Shopping	View Carts					Q
	My Carts and Orders	View My Orders (Last 90 Days)					
	Admin						
血	Shopping Settings						
-22,							~~~~~~
28						R	
հե			Eab Supplier		BECKMAN Lab Supplies	Chem Lab Sup	plies
<b>é</b> ?							
•			Dot Scientif		EMSCO	∆LI	)P
			Lab Supplie		STOLEN DE	Lab Sup	plies
	Your participation						
	greatly appreciate Purchasing and Payables S (مرحم)		RAINII Pipetting 360 Lab Supplier	5	Lab Supplies	Lab Sup	plies

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

	TUmarketplace BETA	All 🔻	Search (Alt+Q)	۹	1,286.00 USD 🗎	♡  123 🌲 .	1
	Shopping Cart ▼ 2021-04-28 tue71824 01					<del>.</del>	
51 0	Simple Advanced Search for products, suppliers, forms, part number, etc			 Q	Estimate (1,286.00 US Total:	<b>℃) ~</b> 1,286.00	
血	3 Items		C	] -	Proceed To (	Checkout	
<b>1</b> 22	Agilent Technologies Incorporated · 3 Items	s · 1,286.00 l	JSD ····		As	Cart	
հե	SUPPLIER DETAI Science Catalog SupplierBusiness	1 : U S Chemical A	analysis Bus Ctr, 285	•			

- 3. 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:
  - 3.1. 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.

marketplace be	TA						All 🕶	Searc
equisition 👻 :	3258109							
Summary PO Previ	ew Comments	Attachments Histo	ory					
General		🖋 ··· Shipp	bing	ø	··· Billing	1		
Accounting Codes								
Chart	Fund	Organization	Account	Program	A	ctivity	Location	
T Temple University	no value Required	no value © Required	no value Required	no value Required		o value	no value	
Internal Notes and	Attachments	💉 ··· Exter	nal Notes and Atta	achments 💉	··· Purch	asing Use Only		
3 Items		0 hama 1 006 00	1100					
Agilent Technolog		· 3 Items · 1,286.00 upplier Business 1 : U S C PO N	Chemical Analysis Bus	Ctr, 285 ▼ assigned - edit to specify				
Agilent Technolog	Science Catalog Su	Ipplier Business 1 : U S C	Chemical Analysis Bus					
Agilent Technolog SUPPLIER DETAILS Contract	Science Catalog St	Ipplier Business 1 : U S C	Chemical Analysis Bus		Unit Price	Quantity	Ext. Price	
Agilent Technolog SUPPLIER DETAILS Contract PO Clauses Item	Science Catalog St	upplier Business 1 : U S C PO N	Chemical Analysis Bus lumber To be	assigned - edit to specify Size/Packagin		Quantity	Ext. Price 536.00	
Agilent Technolog SUPPLIER DETAILS Contract PO Clauses Item	Science Catalog Su no value Add	upplier Business 1 : U S C PO N	Catalog No.	assigned - edit to specify Size/Packagin g 100Reaction	Unit Price			
Agilent Technolog SUPPLIER DETAILS Contract PO Clauses Item 1 MycoSensor QP V ITEM DETAILS	Science Catalog Su no value Add	upplier Business 1 : U S C PO N	Catalog No.	assigned - edit to specify Size/Packagin g 100Reaction	Unit Price			

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

â	TUmarketplace ветл		All 🕶	Search (Alt+Q)	م	1,286.00 USD 📜	∽  ⊾124	<b>* 1</b>
	Requisition - : 3258109						۰ 🖶	?
 10	Summary PO Preview Comments Attachments Histor	ry						
<b>S</b>	Agilent Technologies Incorporated - 3 Items - 1,286.00 I	Override U Supplier						
自 撃 止	SUPPLIER DETAILS Science Catalog Supplier Business 1: U S Ch Contract PO Number no value To be assigned - edit to PO Clauses Add     Item Catalog No. Siz kag	o Delivery Bill To Use your Account		Card for orders les	s than \$5	K if you see an edit	button availabl	e here.
•	MycoSensor QPCR Assay Kit, 100 Rxn       302106       100         TEM DETAILS       Image: Contract: no value       Manufacturer Name       Contract: no value         Manufacturer Part       Taxable       Xable       Xable         Number       X       Commodity Code       1000000 / Bloch         More Information URL       http://www.chem.agilent.com/sear       Commodity Code	Add Discou Add to Favo Move to An Add to Po F	int orites other Cart it Cart or Pe Revision	nding PR/PO		↓ Initia Futur	<b>il Budget Authoriz</b> . e	> >

- 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.

	TUmarketplace BET	A		All - Search (Alt+Q)	<b>Q</b> 1,286.00 USD 📜	♡ 🕮 🔺 👤
μ,	Edit Accounting Codes					×
íð	Accounting Codes					
<b>Q</b>	Chart *	Fund *	Organization *	Account *	Program *	Activity
鱼	T Ľ	Search ∠ ⊗ Required	Search ∠ ⊗ Required	Search ∠ ⊗ Required	∠ ⊘ Required	Software Supplies
-112						+
յրը	۲.					•
a).	★ Required fields				Save Chang	
					Subtotal	1,286.00

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

合	TUmarketplace BETA	A		All - Search (Alt+Q)	<b>Q</b> 1,286.00 USD 📜	♡   ¹²³ ≜ ⊥
E	Edit Accounting Codes					×
6	Accounting Codes					
<u>e</u>	Chart *	Fund *	Organization *	Account *	Program *	Activity
血	T Ľ	100000 🖌	83000 🖌	7201 🖌	06 Ľ	Search
北						
հր	4					•
<b>a</b> 7	★ Required fields				Save Changes	Close
×	3 Items				Subtotal	1,286.00

- 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".

â	TUmarketplace в	IETA		All  Search (Alt+Q)	Q 1,286.00	usd 📜 🗢 🏴
T	Override Line 1: Accourt	nting Codes				×
5	Chart *	Fund *	Organization *	Account *	Program *	Activity
0	τĽ	100000	لا 83000 لا	Search		∠ Search
Â				Profile Values		+ ~ * *
<b>42</b> 5	4			7200 - General Supplie		+ D
III	🖈 Required fields			7217 - Peripherals - Un	der \$5,000	Save Close
				Organization Values		
<b>a</b> 7	Item		Catalog No. Size/Pac Kaging	Jn Search	What	's next for my order?

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.)

â	TUmarketplace	BETA		All      Search (Alt+Q)	<b>Q</b> 1,286.00 USD	₩ ♥ ₩ ▲ ▲
١.	Override Line 1: Acc	ounting Codes				×
16	Chart *	Fund *	Organization *	Account *	Program *	Activity
0	Т	Search k	2 Search Q	Search 🖌	Ľ	Search ,
Â						+ 🖌 🔶 D
223	4				_	۰ ک
lik	★ Required fields					Save Close
ച്	Item		Catalog No. Size/Pac Ur	nit Price Quantity		

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.

Custom Field Search (YOU MUST	USE A SEARCH PARAMETER	0	×
Value	dean	Filter	Â
		Clear All Filters	
1-20 of 20 Results		200 Per Page 🔻	
Value ^	Description		11
02010	Podiatry:Dean's Office	+	
02019	Podiatry:Dean's Office - TEST	+	
06200	TUSM:Dean's office	+	
07010	Dental:Dean's Office	+	
08010	Pharmacy:Dean's Office	+	
09010	CHP:Dean's Office	+	
11010	Ambler:Dean's Office	+	
12010	Tyler:Dean's Office	+	
13110	CST:Dean's Office	+	
13111	CST:Dean's Funds	+	
14010	Law:Dean's Office	+	
15010	Business:Dean's Office	+	
18010	CLA:Dean's Office	+	-
		Cano	el

#### 4.3.3. Complete each of the FOAPAL fields and click "Save".

verride Line 1: /	Accounti	ng Codes								;
chart *		Fund *		Organization *		Account *		Program *		Activity
т	Ľ	100000	Ľ	06200	Q	7217	Ľ	02	Ľ	Search
									Save	Clo

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.

<b>^</b>	TUmarketplace вета		► IIA	Search (Alt+Q)	۵	0.00 USD 🗶	♡   <mark>•124</mark>	4 1
2	Simple Advanced Go to: No	on-Catalog Item   Favori	ites   Forms   Shop	Farrah Al-Man	soor			
	Search for products, suppliers, forms, part number, etc.			View My Profile				
1				Dashboards Manage Searches	s			
<b>O</b>				Manage Search E				
				Set My Home Pag	ge			
血		Showcase		My Pending Requ	isitions			8
22							enout	Help
	TESTING REGION	Agilent	😂 BD	COULTER		SCIENTIFIC INC.		
հղ		Lab Supplies	Lab Supplies	Lab Cuppling	Lab Supplies	Lab Supplies	Lab Supplies	
<u> </u>	Welcome TUmarketplace							

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

1	TUmarketplace BETA	(au tha			All 👻	Search (Alt+Q)	۵
~	My Profile  Custom Field and Accounting Code Det	rauits					
7	Farrah Al-Mansoor		Custom Field and Accounting	Code Defaults	3		
í,	User Name tue71824		Header (int.) Codes Code Favorites				
6						?	
	User Profile and Preferences	5	Custom Field Name	Default Value	Description	Edit Values	
	Update Security Settings	5	Event Award Date	No Defau	lt Value	Edit	
Ê	Default User Settings	2	Event Close Date	No Defau	lt Value	Edit	
	Custom Field and Accounting Code Defa	aults	Event Issue Date	No Defau	lt Value	Edit	
-22	Default Addresses		Event Name	No Defau	lt Value	Edit	
	Cart Assignees		Event Title	No Defau		Edit	
հեր	Checkout Settings						
	Financial Approvers		Close PR?	No Defau		Edit	
<b>a</b> 7	Payment Options		Order Contact Area Code	No Defau	lt Value	Edit	
	User Roles and Access	5	Order Contact Email	No Defau	lt Value	Edit	
<b>. 😫</b> -	Ordering and Approval Settings	5	Order Contact Phone (xxx-xxxx)	No Defau	lt Value	Edit	
	Permission Settings						]
	Notification Preferences	>					
		>					
	User History	>					
	Administrative Tasks	>					

4. 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 <u>not</u> 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.

Farrah Al-Mansoor		Custom Fier and Accounting C	Code Defaul	ts	
User Name tue71824		Header (int.) Codes Code Favorites			2
User Profile and Preferences		Custom Field Name	Default Value	e Description	Edit Values
Update Security Settings		Organization	No D	efault Value	Edit
Default User Settings	i e	Fund	100000	Operating Fund	Edit
Custom Field and Accounting Code D	efaults	Activity	No D	efault Value	Edit
Default Addresses		Chart	т	Chart T	Edit
Cart Assignees		Program	No D	efault Value	Edit
Checkout Settings		Location	No D	efault Value	Edit
Financial Approvers		Account	7200	General Supplies	Edit
Payment Options		Buyer Name (for Purchasing Dept Only)	No D	efault Value	Edit
User Roles and Access	>	Send to Bid		efault Value	Edit
Ordering and Approval Settings	>	Special Handling		efault Value	
Permission Settings	>	special Halluling	NO D	eraurt value	Edit
Notification Preferences	>				
User History	>				

5. A screen will appear with a "Create New Value" button. Click on the button to enter your information.

Farrah Al-Mansoor	Custo	om Field and Acco	ounting Code Def	aults	
Jser Name tue71824	Heade	r (int.) Codes Code Fa	vorites		
User Profile and Preferences		ustom Field Name	Default Value	Description	Edit Value
Update Security Settings	· · · · · · · · · · · · · · · · · · ·	ization	No Defau	ılt Value	Edit
Default User Settings	< / Ec	lit Values			Clo
Custom Field and Accounting Code	Defaults	te New Value			
Default Addresses					
Cart Assignees	Value	e Description	-		
Checkout Settings					
Financial Approvers					
Payment Options			-		
User Roles and Access	>				
Ordering and Approval Settings		tom Field Values marked			
Permission Settings		isk are role-based values modify the Default statu			
		om Field Values.	or mese		

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

Farrah Al-Mansoor		Custom Field and Acc	counting Code De	faults	
Jser Name tue71824		Header (int.) Codes Code F	Favorites		
User Profile and Preferences	•	Custom Field Name	Default Value	e Description	Edit Values
Update Security Settings	Š	Organization	No E	Default Value	Edit
Default User Settings	i k	🖊 Edit Values			Clo
Custom Field and Accounting Code D	Defaults	Create New Value			
Default Addresses			earch For Value (YOU		
Cart Assignees		Value Description 🔺	ield Name	Organization	CH PARAMETER)
			IEIG INdiffe	organization	
Checkout Settings		v	/alue	83000	
Checkout Settings Financial Approvers			alue Description	83000	
ů,		C		83000 5 V	
Financial Approvers	>	C	Description		
Financial Approvers Payment Options	>	C	Description	5 -	
Financial Approvers Payment Options User Roles and Access		* Custom Field Values marked with an	Description	5 -	
Financial Approvers Payment Options User Roles and Access Ordering and Approval Settings	>	* Custom Field Values marked with an asterisk are role- based values. Users	Description	5 -	
Financial Approvers Payment Options User Roles and Access Ordering and Approval Settings Permission Settings	>	* Custom Field Values marked with an asterisk are role-	Description	5 -	

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.

		Custom Field and Accou	unting code De	auno	
User Name tue71824		Header (int.) Codes Code Fav	orites		
User Profile and Preferences	•	Custom Field Name	Default Value	Description	Edit Values
Update Security Settings	5	Organization	No Def	ault Value	Edit
Default User Settings	<	🖊 Edit Values			Clos
Custom Field and Accounting Code Defa	aults	Create New Value			
Default Addresses				Results	
Cart Assignees		Value Description	-	Per Found	Page 1 of 1 📐
Checkout Settings				Page 100110 1	age for the
Financial Approvers				Select Value	Description
Payment Options					Description
User Roles and Access	>			🗹 83000 Pu	rchasing Main
Ordering and Approval Settings	>	* Custom Field Values marked v	with an	Add Values Ba	ck to Search
Permission Settings	>	asterisk are role-based values. only modify the Default status			
Notification Preferences	>	Custom Field Values.	or these		

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

Farrah Al-Mansoor		Custom Field	and Accou	nting Code Defa	aults	
				_		
User Name tue71824		Header (int.) Coc	Code Favor	rites		
User Profile and Preferences	•	Custom Fie	ld Name	Default Value	Description	Edit Value
Update Security Settings	5	Organization		No De	efault Value	Edit
Default User Settings	<	🖊 Edit Values				Clo
Custom Field and Accounting Code De	efaults	Create New Value				
Default Addresses			Sear	ch For Value (YOU	MUST USE A SEAR	CH PARAMETER)
Cart Assignees		Value Descripti	on 🔶	Name	Organization	,
Checkout Settings		83000 Purchasi			83000	
Financial Approvers		Main	Desc	ription		
Payment Options				Ilts Per Page	5 🗸	
User Roles and Access	>			-	Search	
Ordering and Approval Settings	>	* Custom Field V	alues No Re	sults Found		
Permission Settings	>	marked with an				
	>	asterisk are role- values. Users can				
Notification Preferences						
Notification Preferences User History	5	modify the Defau status of these	ılt			

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

<b>^</b>	TUmarketplace BETA	Defaulta			All 👻	Search (Alt+Q)
1		Defaults	Quatern Field and Asso	unting Code De	faulta	
	Farrah Al-Mansoor		Custom Field and Acco	bunning Code De	lauits	
Í.	User Name tue71824		Header (int.) Codes Code Fa	vorites		
<b>e</b>						?
**	User Profile and Preferences	>	Custom Field Name	Default Value	Description	Edit Values
	Update Security Settings	>	Organization	No Defa	ult Value	Edit
Ê	Default User Settings	<	🖊 Edit Values			Close
<u> 12</u>	Custom Field and Accounting Code D	efaults	Create New Value			
-0	Default Addresses			Edit Existing	n Value	2
յլլ	Cart Assignees		Value Description	^ Value	83000	
ш	Checkout Settings		83000 Purchasing Main	Description	Purchasing Main	
	Financial Approvers			Default		
<b>a</b> 7	Payment Options				active	
	User Roles and Access	>		Status		
<b>\\$</b>	Ordering and Approval Settings	>	* Custom Field Values marked		Save Remove	
	Permission Settings	>	with an asterisk are role-based	b		
	Notification Preferences	>	values. Users can only modify the Default status of these			
	User History	>	Custom Field Values.			
	Administrative Tasks					

10. 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.

	TUmarketplace вета					ΔΙΙ 🔻	Search (Alt+Q)
	My Profile  Custom Field and Accounting Code	Defaults		Success Successfully S	aved Changes		
-	Farrah Al-Mansoor		Custom Field a	nd Accounti	ng Code Def	aults	
1	User Name tue71824		Header (int.) Codes	Code Favorites	5		
•							?
	User Profile and Preferences	>	Custom Field N	ame Def	ault Value	Description	Edit Values
	Update Security Settings	5	Organization	83000	Pu	urchasing Main	Edit
Ĩ	Default User Settings	×.	🖌 Edit Values				Close
101	Custom Field and Accounting Code D	efaults	Create New Value				
<b>4</b> 8	Default Addresses				Edit Existing	Value	2
	Cart Assignees		Value Descriptio	n 📩	Value	83000	•
հե	Checkout Settings		83000 Purchasin	g Main	Description		
<b></b>	Financial Approvers				Default	Purchasing Main	
<b>. . . . . . . . . .</b>	Payment Options				Status	active	
ж	User Roles and Access	>			Status	Save Remove	
<b>\$</b>	Ordering and Approval Settings	>	* Custom Field Valu	ies marked		Save Remove	
	Permission Settings	>	with an asterisk are values. Users can o				
	Notification Preferences	>	the Default status of	of these			
	User History	>	Custom Field Value	s.			
	Administrative Tasks	>					

11. 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.

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	Simple Advanced Go to: No	on-Catalog Item   Favorites   Fo	rms   Shop	Farrah Al-Manso	or			
	Search for products, suppliers, forms, part number, etc.			View My Profile				
Í.				Dashboards Manage Searches				
				Manage Search Exp	orts			
血				Set My Home Page				_
feit		Showcase		My Pending Requisi	tions		_	8
-225	TESTING REGION					Lo	gout	Help
. Lik			BD upplies		Supplies	scientific inc. Lab Supplies	Lab Supplies	
ക്	Welcome TUmarketplace							

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

Farrah Al-Mansoor		Payment Options	
Jser Name tue71824		Apply the default card.	
User Profile and Preferences	>	Add a New Card My Cards	
Update Security Settings	>		
Default User Settings	<		
Custom Field and Accounting Code D	efaults		
Default Addresses			
Cart Assignees			
Checkout Settings			
Payment Options			
User Roles and Access	>		
Ordering and Approval Settings	>		
Permission Settings	>		
Notification Preferences	>		
User History	>		
Administrative Tasks	5		

- 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.		
My Cards	Card Details	
	Name this card (e.g. My Visa)	Department Pcard
	Cardholder Name	Stella White
	Card Number	1234123412345678
	Expiration Date	1 🖌 2024 🗸
	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		<i>"</i> ••••••	Shipping		<i>"</i>	Billing	ø ···· ~
Cart Name	2021-07-02 tue71824 01		Ship To			Bill To	
Description	no value		Room/Floor/Attn 317/3rd Fl/Farrah A Department Purchasing	-Mansoor		Accounts Payable 215-926-2048	
Priority	Normal		Liacouras Walk - 038			1852 N. 10th Street (083-11) Philadelphia, PA 19122	
Prepared by	Farrah Al-Mansoor		PHILADELPHIA, PA 19122 United States			United States	
Prepared for	Farrah Al-Mansoor						
			16			Billing Options	
			If you are a Reviewer, enter your inform status information:	nation here to be contacted wit	in order	Accounting Date no value	
			Order Contact Area Code no value (xxx)			AP Controls Name (for AP no value Only)	
			Order Contact Phone (xxx- no value xxxx)			AP Processor Name (for no value AP Only)	
			Order Contact Email no value				
						TPCard (<\$5K)	<b>e</b>
			Delivery Options			Use your Temple pCard for orders less the available here.	an \$5K if you see an edit button
			Ship Via Best Carr	ier-Best Way		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.

		Edit TPCard (<\$5K)							×
		Use your Temple pCard for	orders less than \$5K if you	u see an edit button a	vailable here	e.			
		Select a new credit card		Select one of your c	edit cards		Select no cre	edit card	
		O New credit card		Department F	card	Î ¶	O No crea	dit card assigned	
				Cardholder	Stella Whit	'e			
				Name					
General				Card Number	XXXXXXXXX	XXXXX5678			
Cart Name Description	2021-07-02 tue718 no value			Card Security	123		1		-
Priority	Normal			Code	120				
Prepared by	Farrah Al-Mansoor			Expiration Date	1 🔹	2024 🔻			
Prepared for	Farrah Al-Mansoor								
								Save Changes	Close
	·		Order Contact Phone (xxx- xxxx)	no value			AP Processor Name (	for no value	°
			Order Contact Email	no value		- <b>-</b>	AP Only)		
							TPCard (<\$5K)		/
			Delivery Options	Best Carrier-Best Way	-		Use your Temple pCar available here.	rd for orders less than \$5K if you	see an edit button
			Ship via	Best Carrier-Best Way			Cardholder Name	Stella White	
							Card Number	XXXXXXXXXXXXXXX5678	
							Card Security Code	XXX	
							Expiration Date	1/2024	

**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).

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•							
1	Simple Advanced	Go to: Non-Cat	talog Item   Favorites	Forms   Shop	p   Quick Order	Browse: Suppliers   C	Categories   Contracts   Chemicals
6	Orders	Quick search	٩				Q
<u>e</u>	Search	Requisitions to Approve					
ATA .	My Orders	Purchase Orders to Appr	rove				··· v
血	Approvals +	Requisitions Recently Ap					
兆		Purchase Orders Recentl Assign Substitute Approv Assign Substitute Approv	vers-Requisitions		BD Lab Supplies	BECKMAN COUTER Lab Supplies	Lab Supplies
հր		Approval Notifications					
<b>.</b>	Your participation i	s greatly	DENVILLE BORNTHIC INC Lab Supplies	li li	ot Scientific ncorporated Lab Supplies	* EMSCO	
<b>\$</b>	appreciated	!					
	Purchasing and Payab	les Staff	D			-	Sigma
	(P2P)		Perkingimer Lab Supplies		Pipetting 360° Lab Supplies	Lab Supplies	Lab Supplies
٩	When preparing an A	Accounts	spectrum		<b>NSA</b>	COMPUTER BUSINESS SERVICES	

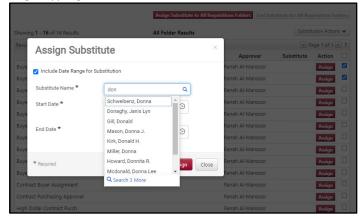
- 3. When assigning substitute folders, you can assign one, some, or all of your folders to another user.
  - a. To assign one folder: Click the "Assign" button next to the folder.
  - b. To assign multiple folders:
    - Place a check in each of the folders for which you would like to assign a substitute 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.

Orders  Approvals  Assign Substitu	te Approvers-Requi	sitions						
					Assign Substitute to All I	Requisitions Folders End Su	bstitute for All Re	quisition
	Showing 1	- 16 of 16	Results		All Folder Results		Substi	itution Ad
Search Details	Results Pr	er Page 2	~	Sort by:	Folder name ascending	· ·	e P	age 1 o
				Folder Name		Approver	Substitute	Acti
Filtered by	Buyer As	signment				Farrah Al-Mansoor		Acci
Type: Requisitions	Buyer Na	me (for Pu	rchasing Dept Or	nly): Delores Tyler: (All Val	ues)	Farrah Al-Mansoor		Assi
	Buyer Na	ime (for Pu	rchasing Dept Or	nly): Donna L. Schweiben:	: (All Values)	Farrah Al-Mansoor		Assi
Refine Search Results	Buyer Na	ime (for Pu	rchasing Dept Or	nly): Farrah Al-Mansoor: (	All Values)	Farrah Al-Mansoor		Assi
	Buyer Na	me (for Pu	rchasing Dept Or	nly): Jennifer Muller: (All \	(alues)	Farrah Al-Mansoor		Assi
Туре	Buyer Na	ime (for Pu	rchasing Dept Or	nly): Jim Curran: (All Value	5)	Farrah Al-Mansoor		Assi
Requisitions 💙	Buyer Na	ime (for Pu	rchasing Dept Or	nly): Mary Ann Fong: (All	Values)	Farrah Al-Mansoor		Assi
View Approvals For	Buyer Na	ime (for Pu	rchasing Dept Or	nly): Naomi Greenberg: (4	ll Values)	Farrah Al-Mansoor		Assi
My Approvals 🗸	Buyer Na	ime (for Pu	rchasing Dept Or	nly): Renee Merritt: (All Va	lues)	Farrah Al-Mansoor		Assi
Approver	Buyer Na	ime (for Pu	rchasing Dept Or	nly): Tarah Morris: (All Val	ues)	Farrah Al-Mansoor		Assi
Farrah Al-Mansoor (16)	Contract	Buyer Assi	gnment			Farrah Al-Mansoor		Assi
	Contract	Purchasing	Approval			Farrah Al-Mansoor		Assi
	High Dol	lar Contrac	t Purch			Farrah Al-Mansoor		Assi
	My PR A	pprovals				Farrah Al-Mansoor		Assi

- 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).

	ng <b>1 - 16</b> of 16 Results	All F	older Results					ns 🐨
Resu		tituto		×			age 1 of 1 [	
	Assign Subs	lilule			Approver	Substitute	Action	
Buye	Include Date Range fo			Farrah Al-Mansoor		Assign	E	
Buye					Farrah Al-Mansoor		Assign	I
Buye	Substitute Name *	ssign Substitute Include Date Range for Substitution batitute Name * Type to filter art Date * O7/16/2021 03:00 PM O7/26/2021 08:00 AM O7/26/20	٩		Farrah Al-Mansoor		Assign	
Buye	Start Date *	07/16/2021 03:00 PM mm/dd/yyyy hh:mm a 07/26/2021 08:00 AM	<b></b>		Farrah Al-Mansoor		Assign	
Buye		mm/dd/yyyy hh:mm a			Farrah Al-Mansoor		Assign	
Buye	End Date *	Include Date Range for Substitution     Arrah Al-Mansoor     Audign       Substitute Name *     Type to filter     Parah Al-Mansoor     Audign       Start Date *     07/16/2021 03:00 PM     O     Arrah Al-Mansoor     Audign       Bind Date *     07/26/2021 08:00 AM     O     Orarah Al-Mansoor     Audign       mm/dd/yyyy hhmm a     Tarah Al-Mansoor     Audign       Buyer Assignment     Close     Farah Al-Mansoor     Audign			Farrah Al-Mansoor		Assign	
Buye			∎ G		Farrah Al-Mansoor		Assign	
Buye								
Buye	* Required		Assian	Close	Farrah Al-Mansoor		Assign	
Buye					Farrah Al-Mansoor		Assign	
	act Buyer Assignment				Farrah Al-Mansoor		Assign	
	act Purchasing Approval				Farrah Al-Mansoor		Assign	
					Farrah Al-Mansoor		Assign	

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 <b>1</b> - <b>16</b> of 16 Results	All Folder Results	Substit	tution Actio
Results Per Page 20 🗸	Sort by: Folder name ascending 💙		age 1 of 1
Folder Name	Approver	Substitute	Action
Buyer Assignment	Farrah Al-Mansoo	Janis Lyn Donaghy Start Date: 07/16/2021 3:30 PM ➡ End Date: 07/26/2021 8:00 AM	Remove
Buyer Name (for Purchasing Dept Only): Delores Ty	rler: (All Values) Farrah Al-Mansoo	Janis Lyn Donaghy Start Date: 07/16/2021 3:30 PM ➡ End Date: 07/26/2021 8:00 AM	Remove
Buyer Name (for Purchasing Dept Only): Donna L. S	Schweibenz: (All Values) Farrah Al-Mansoo	r	Assign
Buyer Name (for Purchasing Dept Only): Farrah Al-	Mansoor: (All Values) Farrah Al-Mansoo	r	Assign
Buyer Name (for Purchasing Dept Only): Jennifer M	tuller: (All Values) Farrah Al-Mansoo	r	Assign
Buyer Name (for Purchasing Dept Only): Jim Currar	r: (All Values) Farrah Al-Mansoo	r	Assign
Buyer Name (for Purchasing Dept Only): Mary Ann	Fong: (All Values) Farrah Al-Mansoo	r	Assign
Buyer Name (for Purchasing Dept Only): Naomi Gr	eenberg: (All Values) Farrah Al-Mansoo	r	Assign

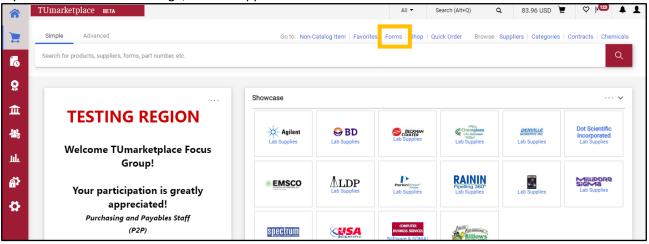
- 6. To unassign your substitute approver, do one of the following:
  - a. To unassign one folder: Click on the "Remove" button next to their name.
  - b. To unassign multiple folders: Check the boxes, click the "Substitution Actions" button, and select "Remove Substitute from Selected Folders".

	All Folder Res	sults	Substitu	ition Action	2
Results Per Page 20 💙	Sort by: Folder name	e ascending 🖌	I Pa	ge 1 of 1 🛛	Þ
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	0
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	C
Buyer Name (for Purchasing Dept Only): Donna I	L. Schweibenz: (All Values)	Farrah Al-Mansoor		Assign	(
Buyer Name (for Purchasing Dept Only): Farrah A	Al-Mansoor: (All Values)	Farrah Al-Mansoor		Assign	C
Buyer Name (for Purchasing Dept Only): Jennifer	Muller: (All Values)	Farrah Al-Mansoor		Assign	C
Buyer Name (for Purchasing Dept Only): Jim Cur	ran: (All Values)	Farrah Al-Mansoor		Assign	(
Buyer Name (for Purchasing Dept Only): Mary Ar	nn Fong: (All Values)	Farrah Al-Mansoor		Assign	(
	Greenberg: (All Values)	Farrah Al-Mansoor			

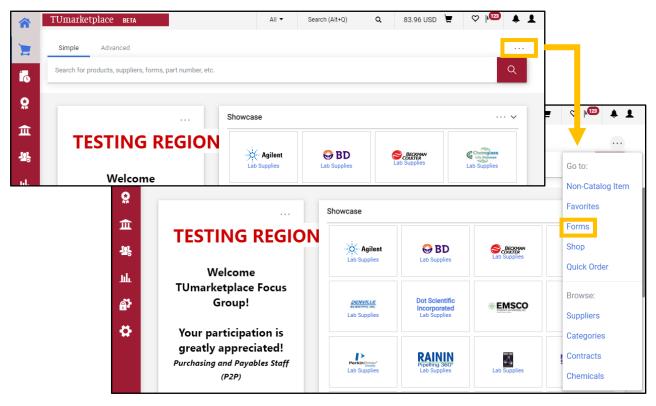
## Placing a Change Order

**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.



3. Navigate to the correct folder in the panel on the left of the screen: Under "Shared", click "Organization Forms".

Shop      Shopping      View Forms		
Build a New Form Non-Catalog Item	Organization Forms	Folder Actions 🕶 🛛 <b>?</b>
Expand All Collapse All		Actions for Selected Favorites 👻
<ul> <li>Personal</li> </ul>	Page 1 of 2 1-20 of 24 Results	20 Per Page 👻
You have no personal favorites.		
✓ Shared	Accounts Payable Invoice Payment Form	0.00 USD
Controller's Office HR Benefits Forms	Purchase orders are not required for product or service totaling \$5000.00 or less. When a Temple	View Form
HR Payroll Forms	Purchasing Card (TPC) is not accepted or not available, you may request payment by completing this form. Attach any backup documentation and/or invoice to the requisition.	Edit   Move   Copy   Delete
Inner Company Transfer with Japan		
Organization Forms	Contract Approval	0.00 USD
restroider		View Form
US Bank Loans		Edit   Move   Copy   Delete
	Creative Services Design Only Request Form ver 4 from Creative Services	0.00 USD
		EA
		View Form Edit   Move   Copy   Delete
	Development Communications from Development Communications Please use this form to request communication work from central Alumni & Development	2,500.01 USD

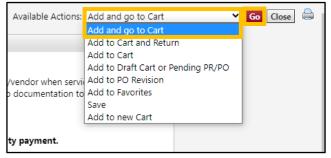
4. Find "PO Change Request Form" in the list of organization forms and click on the form name or the "View Form" button to open it.

Mobile Device Service Reimbursement Form (formerly Personal Cellular/Smart Phone Reimbursement Form) from Human Resources-Payroll	5,000.00 USD View Form Edit   Move   Copy   Delete	
PO Change Request Form rom Temple Purchasing Use this form to make any change to an existing order; i.e. close an open committment, increase or decrease qty, change in price.	0.00 USD View Form Edit   Move   Copy   Delete	
Proshred Service Update Form from Temple Purchasing Use this form to add, remove, or modify your shredding services, including bin type, scheduling, and FOAPAL changes.	5,000.01 USD View Form Edit   Move   Copy   Delete	
Purchasing Card Application from Temple Purchasing	50,001.00 USD	

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

PO Change Request Instructions ?	PO Change Request Details ?
Use this form to request a change to a Purchase Order that has already been sent to the supplier.	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 <b>bold</b> are required.
<ul> <li>In order to ensure proper handling of your request, you must do the following:</li> <li>Complete this form by providing as much detail as possible regarding the requested change.</li> <li>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.</li> <li>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.</li> <li>This form will be routed through the FOAPAL review process and then to Purchasing for the completion of the change request.</li> </ul>	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
Supplier Information       ?         Supplier       Temple Purchasing         Fulfillment       Fulfillment Address 1:         Address       Form Type         Form Type       Internal Change Request         Commodity	2000 characters remaining expand   clear If known, enter the Buyer's initials from the PO.

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.



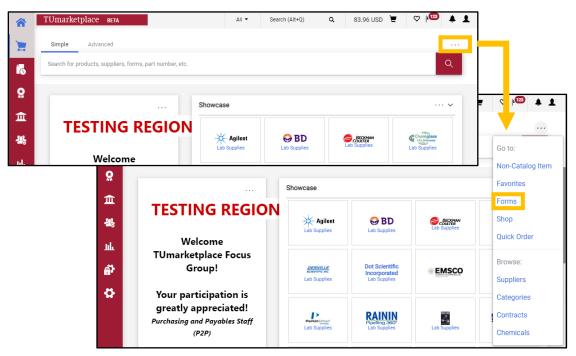
# Placing a Blanket Purchase Order or Contract Manager Request

**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.

â T	Umarketplace beta			All 🕶	Search (Alt+Q)	a 83.96 USD	. ⇔ I ₁₀₀ †
-	Simple Advanced	Go to: Non-C	atalog Item   Favorite	s Forms   Shop   C	uick Order Browse:	Suppliers   Categories	Contracts   Chemicals
•	Search for products, suppliers, forms, part number, etc.						Q
5		Showcase					··· v
Ĩ	<b>TESTING REGION</b>	4	0.22		Changelage	0500/11/5	Dot Scientific
£	Welcome TUmarketplace Focus Group!	Agilent Lab Supplies	BD Lab Supplies	Constrant Lab Supplies	Chomplass Lab Supplies	DEMVILLE SCIENTING INC Lab Supplies	Incorporated Lab Supplies
8	Your participation is greatly	* EMSCO		PerkinElmer* Lab Supplies	Pipetting 360° Lab Supplies	Lab Supplies	Lab Supplies
}	appreciated! Purchasing and Payables Staff (P2P)	spectrum		COMPUTER BUSINESS STRVICES	Billows		

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



3. Navigate to the correct folder in the panel on the left of the screen: Under "Shared", click "Organization Forms".

TUmarketplace			
Shop   Shopping   View Forms			
Build a New Form Non-Catalog Item	Organization Forms	Folder Actions 👻 📍	
Expand All Collapse All		Actions for Selected Favorites 👻	
<ul> <li>Personal</li> </ul>	Image         Page         1         of 2         1-20 of 24 Results	20 Per Page 👻	
You have no personal favorites.			
▲ Shared	Accounts Payable Invoice Payment Form	0.00 USD	
HR Benefits Forms HR Benefits Forms HR Payroll Forms Inner Company Transfer with Japan	Purchase orders are not required for product or service totaling \$5000.00 or less. When a Temple Purchasing Card (TPC) is not accepted or not available, you may request payment by completing this form. Attach any backup documentation and/or invoice to the requisition.	View Form 5 Edit   Move   Copy   Delete	
Organization Forms	Contract Approval	0.00 USD	
US Bank Loans		Edit   Move   Copy   Delete	
	Creative Services Design Only Request Form ver 4 from Creative Services	0.00 USD EA	
		View Form Edit   Move   Copy   Delete	
	Development Communications from Development Communications	2,500.01 USD	
	Please use this form to request communication work from central Alumni & Development Communications.	View Form	

4. 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.

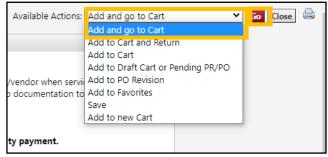
Use this form to request a new Pcard, add or delete FOAPALs, change monthly spend limit or cancel	View Form
an existing card.	Edit   Move   Copy   Delet
Radioactive Materials Request	0.00 USI
Use this form for all radioactive material that cannot be purchased from a catalog. Do not use the non-catalog request form for radiaoactive material.	E/ View Form
	Edit   Move   Copy   Delete
Request to create a blanket order	0.00 US
	View Form Edit   Move   Copy   Delet
Page 1 of 2 1-20 of 24 Results	20 Per Pa

- 5. 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.

$m{J}$ Request to create a blanket order - Google Chr	ome	- 0	×
solutions.sciquest.com/apps/Router/Fa	voritesFormEdit?&FavoriteProductId=915492&wantReloa	dOnClose=true&FavPageContext=2&tmstmp=1624631600011344	
Request to create a blanket order		Available Actions: Add and go to Cart	
Blanket/Master Order Instructions ?	Blanket/M	aster Order Information	?
Use this form to submit a Standing Orders/Blanket Order. Standing/Blanket Orders must be entered manually by Purchasing and Contracting staff into Banner.	Provide a brief description of the request that will appear as Product Description	the short description in the shopping cart. 254 characters remaining expand   clear	
This form will create a requisition in TUMarketplace but not a PO. The requisition will route to Purchasing for review.		ay also attach specifications using internal attachments in the shopping cart.	
		2000 characters remaining expand   clear	-
	Quantity	1	
Supplier Information ?	Unit Price		
Enter Supplier	Provide the previous PO number to expedite your order		
Supplier or Supplier Search   Enter Manually	Blanket Order Request Dates		
Commodity	Start Date		
Code search Form Type Internal Blanket Order	Enter the date the Blanket order will expire, usually 12 mont End Date	mm/dd/yyyy is from start date.	
	Liu Date	mm/dd/yyyy	
	Enter the expiration date for the Blanket Order. If the Blanke Blanket is for a sponsored project, enter the expire date of th Expiration Date	t is tied to a multi-year contract, enter the date that the contract expires. If th ne grant.	e
		Total ( See configuration for this fo	0.00 prm

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.

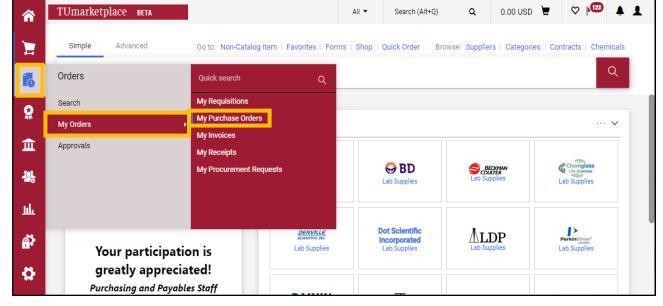


<u>*Please note:*</u> If you are requesting a contract in Contract Manager and you already have an agreement, please be sure to attach it to the requisition as an Internal Note.

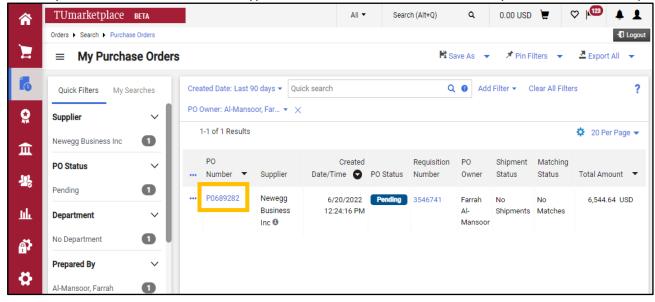
# Adding Receipts/Receivers to Purchase Orders

**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.

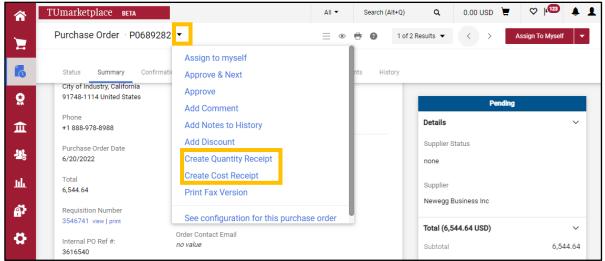
- 1. Log in to TUmarketplace.
- 2. Navigate to the PO by completing a search (see <u>Quick Search for a Requisition, Receipt, or Purchase Order</u>) or via the "My Orders" link:
  - 2.1. Hover over the "Orders" icon on the sidebar, then over "My Orders", and then click "My Purchase Orders".



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.



3. 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).



- 4. <u>Create quantity receipt</u>: 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.

Quantity Receipt • 510904			_		Save Updates	Complete
quantity receipt			_		core optioned	Complete
Summary Comments Attachments History						
			_		Draf	•
Receipt Name	Carrier			Details		
Frothers and grinders	UPS 🗸					
				Creatio	on Date 6	6/20/2022 12:57:
Receipt No To Be Assigned	Tracking No.			Source		Ν
	123454321			Supplie	er	Newegg Busine
Receipt Date				Receiv	ed by	Farrah Al-Ma
6/20/2022	Flexible Text Field					
mm/dd/yyyy					6,544.64 USD)	
Packing Slip No.				Subtot	al	6,5
A354	Flexible Text Field 2					6,5
Supplier Name Newegg Business Inc					d Documents	
Received by	Flexible Drop Down			Purch	ase Order: P068928	32
Farrah Al-Mansoor		~				
Receipt Address	Attachments					
Address 🗸	Add					
Room/Floor/Attn Farrah Al-Mansoor						
Department Purchasing Svs	Notes					
General University -See herein Broad & Montgomery	Received milk <u>frothers</u> and coffee bean grinde remain outstanding.	rs. Coffee ma	chines			
PHILADELPHIA, PA 19122 United States	remain outstanding.					
United States	915 characters remaining					
			🗌 📋			

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.

<b>^</b>	TU	Imarke	tplace BETA						All •	Search (A	ut+Q) Q	0.00 USD ` 🗑	∞ 🔎 🔺 1
1	C	Quantity	y Receipt · 510904								= +	Save Updates	Complete 🔻
		Summar	y Comments Attachments Histor	У									
6		PO	• P0689282						•			Draft	
8		Line	ltem		Catalog No.		Quantity	Status			Details	Drait	×
血		1	Nostalgia Electrics CLIT3PLSAQ Aqua Cla	essic Retro 3-Quart	9896-782-144	2 EA	0		0 .		Creation Date	6/2	0/2022 12:57:52 PM
45			loed Tea & Coffee Brewing System With P	lastic Pitcher	50507021144		Ŭ	Received 🗸			Source		Manual
			ITEM DETAILS								Supplier	,	lewegg Business Inc
հե			Contract No.	no value							Received by		Farrah Al-Mansoor
a:			Line Item Type	None									
•			Flex Field 2								Total (6,544.64 U	SD)	~
¥			Attachments	Add							Subtotal		6,544.64
						_							6,544.64
			Notes	Not received as of	6/20/22.						Related Documen	its	~
											Purchase Order:	P0689282	•
				972 characters remaining									
		2	BonJour Coffee & Tea Caffé Froth Monet I	Milk Erothor	9SIV16A6798452	4 EA			0				
		-	bolloodi conce a rea cane riotri moneci	WIIK Prodiel	93171080790432	464	4	Received V	4 ₩ 🗆				
		^	ITEM DETAILS										
			Contract No.	no value									
			Line Item Type	None									
			Flex Field 2										
			Attachments	Add									
						-							
			Notes	Received 6/20/22.									
				982 characters remaining	1								
		3	Manual Coffee Bean Grinder With Ceramic Crank Adjusting Grind Control Cafe Mill M	c Burrs Hand lachine For Kitchen	9SIVB4UHWT6032	4 EA	4	Received 🗸	4 ₩ 🗆				
		^	ITEM DETAILS										
			Contract No.	no value									
			Line Item Type	None									
			Flex Field 2										
			Attachments	Add									
						_							
Q,			Notes	Received 6/20/22.									
→						-							Powered by JAGGAER   Privacy Policy

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.

â	TUmarketplace вета	All 👻 Search	(Alt+Q) Q	0.00 USD 🚶	-	♡   ¹ 23	<b>1</b>
E	Receipt Created						
í.	Summary	Next Steps		-			
e	Receipt No	Create Qty Receipt					
Â	510904 🖶	Create Cost Receip	ot				
<u>18</u>	P0689282						
հե				_			

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.

5 15bar Coffee Machine Concentrated Coffee Se Automatic Pump Type Cappuccino Machine Ite		2 Rec	eived 🗸 🗋 🖬 🗌
Contract No.	Previous Recei 510904 🗧	ipts	
5 15bar Coffee Machine Concentrated Coffee Semi- Automatic Pump Type Cappuccino Machine Italian	SIVB4UHWT6011 3 EA 1	Received	▲ ■ □
∧ ITEM DETAILS ♦			
Contract No. no value	Previous Receipts 510904 👚 510909 🖶		
Line Item Type None			
Flex Field 2			
Attachments			

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.

Line	Item	Catalog No		Quantity	Status	
1	Nostalgia Electrics CLIT3PLSAQ Aqua 3-Quart Iced Tea & Coffee Brewing Sy		44 2 EA	1	Returned Received	<b>↓</b> ① ■ □
^	ITEM DETAILS				Received Returned Cancelled	
	Contract No. <i>no value</i>		510	vious Receipts 904 👮	Cancened	
	Line Item Type None	Returned For		909 🖶		
	Flex Field 2	~		~		
	Attachments Add	Damaged Not Ordered Over Shipment	RM/	A No.		
	Notes			RMA No		
	Item damaged in transit.			Enter the Re	turn Material Authoriza	ation provided by the ve
			4			
	1000 characters remaining					

- 5. <u>Create cost receipt</u>: 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.

			E and a second se
Cost Receipt • 510911		= 0	Save Updates Complete
Summary Comments Attachments History			
			Draft
Receipt Name	Carrier	Details	
Iced coffee maker x1	FedEx 🗸	Creation Date	6/20/2022 3:20:47
Receipt No To Be Assigned	Tracking No.	Source	Man
	256357246525dsfg4525	Supplier	Newegg Business
Receipt Date		Received by	Farrah Al-Mans
6/20/2022 📾	Flexible Text Field	Total (6,544.64	USD)
Packing Slip No.		Subtotal	6,544
43	Flexible Text Field 2		6,544
Supplier Name		Related Docum	nents
Newegg Business Inc.	Flexible Drop Down	Purchase Orde	r: P0689282
Received by Farrah Al-Mansoor	~		
Receipt Address	Attachments Add		
Address 🗸	2400A		
Room/Floor/Attn Farrah Al-Mansoor Department Purchasing Svs	Notes		
General University -See herein Broad & Montgomery PHILADELPHIA, PA 19122 United States	Received 1 of 2 iced coffee makers.		

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.

Sumr	mary Comments Attachments History									
Line	e Item	Catalog No.		Cost	Status				Draft	
1	Nostalgia Electrics CLIT3PLSAQ Aqua Classic Retro 3-Quart Iced Tea & Coffee Brewing System With	9B96-782-144	85.98	42.99	Cost Received	•	* 🗆	Details		
	∧ ITEM DETAILS ♦							Creation Date		6/20/2022 3:20:47
	Contract No.		Previous Rec					Source		Man
	no value		510904 📑 510909 🖶					Supplier		Newegg Business
	Line Item Type None							Received by		Farrah Al-Mans
	Flex Field 2							Total (6,544.64	USD)	
								Subtotal		6,544
	Attachments									6,544
	Add							Related Docum	nante	
	Notes							Purchase Order		÷
			•							
	1 of 2 iced coffee makers received.									
	1000 characters remaining									
2	BonJour Coffee & Tea Caffé Froth Monet Milk	9SIV16A6798452	160.48	0	Cost Received		* 🗆			

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.

<b>^</b>	TUmarketplace вета		All 👻	Search (Alt+Q)	۹	0.00 USD	Ē	♡  ₁123	٨	1
1		Receipt Created								
6		Summary	Ne	xt Steps						
		Receipt No		ate Qty Receipt						
Â		510911 🖶 Created for the PO No(s) )	Cre	ate Cost Receipt						
28		P0689282 🖶								

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.

	7	Car Espresso Coffee Machir USB Charging Portable Coff		9SIVB4UHWT5002	424.17	282.78	Cost Received	• ⁽⁾ * ⁽⁾
		▲ ITEM DETAILS Contract No. no value			Previous Re 510885 51000	<b>9</b>		_
7		offee Machine Machine Small Portable Coffee Pots Home	9SIVB4UHWT5002	424.17	141.39	Cost Received	↓ ① ■ □	
^	ITEM DETAILS			Previous Receipt 510885 🖶 510904 🖶	S			
	Line Item Type None			510909 🖶 510911 🖶				
	Flex Field 2							

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.

Line	Item	Catalog No.		Cost	Status	
1	Nostalgia Electrics CLIT3PLSAQ Aqua Classic Retro 3-Quart Iced Tea & Coffee Brewing Syste	9B96-782-144	85.98	42.99	Cost Cancelled	<b>→</b> □ ■ □
^	ITEM DETAILS 👴				Cost Cancelled	
	Contract No. <i>no value</i>		Previous R 510885 510904			
	Line Item Type None		510909 510911			
	Flex Field 2					

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

	1	TUmarketplace вета								
	3	Purchase Order • P06892	82 🕶							
	4									
			Rec	ceipts 4	Invoices	Co	mments	Attachments	s History	
		General Information		··· s	hipping In	format	ion		⊳ ··· Bil	lling/Payment
ar etpla	ice .		-				AI •	Search (Alt+1	1	l To
ct ise O		P0689282     Confirmations Receipts      Invalues Comm	enta Attactonen	ta Hatay				Start (see	Ac 21 18	counts Payable 5-926-2032 52 N. 10th Street t floor, TASB
patries	ceipts e	out for this PO.								iladelphia, PA 19 ited States
ecords fo	ound	•						+	Bill	ITo Address Code
0.		Receipt Date Receipt Typ	•		Cost Ame	urt	Received by			
10911 (2		6/25/2022 Cost			42,991		Al-Mansoor, Far			
10009 []		6/20/2022 Quantity					Al-Mansoor, Far			
10004 []		6/20/2022 Quantity					Al-Mansoor, Far			
10885 []		6/20/2022 Cost			282.781	USD	Al-Mansoor, Far	Tah		
ine Detail	la 🛛									
No	a. 1	Product Name	Catalog No.		Unit Price	Qty/UC	DM E	Intended Price		
<		Nostalgia Electrics CLIT3PLSAG Aqua Classic Retro 3 Quanticed Tea & Coffee Brewing System With Plastic Pitcher	9896-782-1	44	42.99 USD	2 EA		65.96 USD		
				Qty / Cost (in	0v/0	(Ouf)	Status			
				42.99 US			Open Cost			
				42.99 US			Net Receive	d		
					2		Open			
	2	BonJour Coffee & Tes Caffé Froth Monet Milk Frother	9SW164679	19.457	40.12 USD	4 EA		160.48 USD		
			501110A075	10472	W1.12 000	4 EA		100.46 000		
				Qty / Cost (in	qty/co	(tu0) tex	Status			
				160.48 USE			Open Cost			
				8			Net Receive	d		
		Manual Coffee Bean Grinder With Ceramic Burns Hand Grani Educting Grind Control Cafe Mill Machine For Kitchen	95/984UHW	16032	92.75 USD	4 EA		131.00 USD		
				Qty / Cost (W	qty / Co	(hut) he	Status			
				101.00 USE			Open Cost			
				24			Net Receive	d		
		<ul> <li>Xeoleo Stainless steel Espresso Coffee maker Automatic Coffee machine 15 Bar Pump Expressio machine pressure .</li> </ul>	93/84UHW	16121	949.80 USD	1 EA		949.80 USD		
				Qty / Cost (in	Qty/Co	(turo) tax	Status			
				949.80 USE			Open Cost			
					6		Open			
		<ul> <li>15bar Coffee Machine Concentrated Coffee Semi-Automatic Pump Type Cappuccine Machine Italian Coffee Machine</li> </ul>	997/840HW	15011	314.39 USD	3 EA		943.17 USD		
				Oty / Cost (In	Qty/Ca	(tut) tec	Status			

<u>Note</u>: 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.

ITEM DETAILS	<del>0</del> -					
Contract No. <i>no value</i>		Previous Receipts 510904  🖶				
Line Item	5 15bar Coffee Machine Concentrated Coffee Semi- Automatic Pump Type Cappuccino Machine Italian	9SIVB4UHWT6011	943.17	943.17	Cost Received	<b>~</b> □ ≡ [
Flex Field	∧ ITEM DETAILS ♦					
	Contract No. <i>no value</i>		Previous Receip 510904  🖶	its		
Attachmer	Line Item Type None		510909 🖶			
	Flex Field 2					
	Attachments					

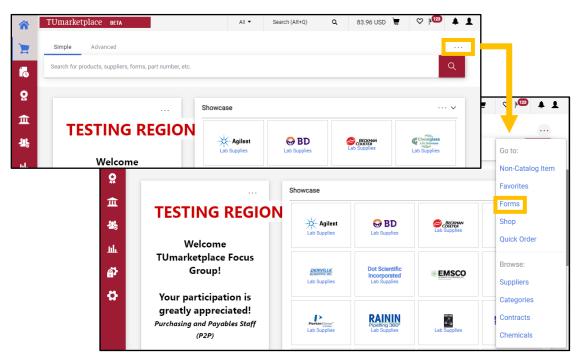
# Creating a Payment Request Through TUmarketplace

**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.

â T	Umarketplace BETA			All 🔻	Search (Alt+Q)	A 83.96 USD	. ⇔ h <u>m</u> †
	Simple Advanced	Go to: Non-C	atalog Item   Favorite	s Forms   Shop   Qi	uick Order Browse:	Suppliers   Categories	Contracts   Chemicals
s	Search for products, suppliers, forms, part number, etc.						Q
		Showcase					🗸
1	TESTING REGION						
5		Agilent Lab Supplies	BD Lab Supplies	BECKMAN COURTER Lab Supplies	Chenglass Lab Supplies	DENVILLE SOUVING INC Lab Supplies	Dot Scientific Incorporated Lab Supplies
•	Welcome TUmarketplace Focus Group!						
	Your participation is greatly	EMSCO		Perkintimer' Lab Supplies	RAININ Pipetting 360" Lab Supplies	Lab Supplies	Lab Supplies
	appreciated!						
	Purchasing and Payables Staff (P2P)	spectrum	BCIENTIFIC	COMPUTER BUSINESS SERVICES	Billows		

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



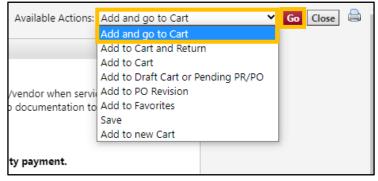
3. Navigate to the correct folder in the panel on the left of the screen: Under "Shared", click "Organization Forms".

Build a New Form Non-Catalog Item	Organization Forms	Folder Actions 🔻 📍
Expand All Collapse All		Actions for Selected Favorites 👻
<ul> <li>Personal</li> <li>You have no personal favorites.</li> </ul>	•         Page         1         of 2         1-20 of 24 Results	20 Per Page 🗸
Shared     Controller's Office     HR Benefits Forms     HR Payroll Forms     Inner Company Transfer with Japan	Accounts Payable Invoice Payment Form Purchase orders are not required for product or service totaling \$5000.00 or less. When a Temple Purchasing Card (TPC) is not accepted or not available, you may request payment by completing this form. Attach any backup documentation and/or invoice to the requisition.	0.00 USD Urew Form Edit   Move   Copy   Delete
Organization Forms Less Folder US Bank Loans	Contract Approval	0.00 USD View Form Edit   Move   Copy   Delete
	Creative Services Design Only Request Form ver 4 from Creative Services	0.00 USD EA View Form Edit   Move   Copy   Delete
	Development Communications from Development Communications Please use this form to request communication work from central Alumni & Development Communications.	2,500.01 USD

4. Open the "Accounts Payable Online Invoice Payment Form" by clicking title or on the "View Form" button.

	TUmarketplace		All 🔻	Search (Alt+Q)	۵	42.87 USD	₩ ♡	165	<b>D</b>
	Shop      Shopping      View Forms								-D Logout
-	Build a New Form Non-Catalog Item	Organization Forms					Fol	der Action	s 🕶 🛛 ?
i.	Expand All Collapse All						Actions for Sele	cted Favo	orites 🔻
<b>Q</b>	<ul><li>Personal</li><li>Shared</li></ul>	Page 1 of 2 1-20 of 24 Results	lts					20 Per P	age 👻
 場。		Accounts Payable Invoice Paymen Purchase orders are not required for pr Temple Purchasing Card (TPC) is not ac completing this form. Attach any backu	oduct or serv cepted or no	t available, you may re	quest payme	ent by		0.00 US iew Form py   Delet	
<mark>еу</mark> ПГ		Contract Approval					_	<b>0.00</b> US Fiew Form py   Delet	
¢		Creative Services Design Only Req	uest Form	ver 4 from Creativ	re Services		_	0.00 US E Tiew Form py   Delet	A
		Development Communications fro Please use this form to request commu Communications.	nication worl			ent	Edit   Move   Co		te
		Diamond Dollars from Diamond Do	ollars					0.00 US	

- 5. Complete the form (see image on p. 3).
- 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.



#### Accounts Payable Invoice Payment Form:

Accounts Payable Invoice Paymer	nt Form	Availabl	e Actions: Add and go to Cart	🖌 🔽 🖌
	EMPLE IVERSITY®	Please use this for products have bee documentation to The request will be This form is not t NOTE: Involce/Su returned. Please a the internal noted	Instructions ment Instructions m to request payment to an individual/vend n received. You must attach an invoice and/ support the request. erouted for review and processing. to be used for any employee or faculty pa poorting Documentation must be attach ttach the invoice, as well as any other pe ifield of the requisition. All attached doc wed as separate files.	for backup syment. ed or request will be ertinent documents to
Gen	eral Information ?	Invoice Informa	tion	
Is this request a fee or award for an employee/faculty?	Please select V	Invoice Number ( N/A) Invoice/Direct Pa		
		Invoice Amount		
Does Vendor accept a Pcard?	Please select 💙	Payment Due Dat	mm/dd/yyyy	
If yes to the question above, please enter the reason the Pcard is not being used?	100 characters remaining expand   clear	Payment Descri Describe Payment being Requested	ption	
Is this payment related to a PO (No/Yes), Travel Advance or Upload? PO Number	Please select 💌			
Is this request for a Student Refund?	Please select 💙			
If yes to the above, the student ID is requidelay in processing this request.	ired. Failure to supply this information will result in a		500 characters remaining	expand   clear
Student Name			Please select 💙	
Student Address		code to be charged start		
Student State		with a (7)?		
Student Zip				
Student TUID (9 digit number)				
Vendo	or Information ?		Vendor Additional Information	n
	or Supplier Search   Enter Manually r or phone number, please enter your department	Payment Type **Is this payment being made to or on behalf of a Non-U.S. Citizen or Non-	Please select.	
Address Sequence (8I 1-100) If Known		Permanent Resident Alien?		
Commodity Code	80000000 search-	If the answer is		
Vendor Address		"Yes" to the question above		
Address Line #1		please attach the		
Address Line #2		tax compliance form.		
City		Does Vendor	Please select 🗸	
State		have W-9 on File		
Zip Code		Is this payment for an Independent Contractor?	Please select_ 💙	
		Is this invoice related to non- employee travel reimbursement?	Please select 💙	
		Is Special Handling Required?	Please select 💙	
		Special Handling	~	
		Type If Special		
		Handling is Required, please describe in detail.		
		Special handling r	nay result in a \$25.00 service charge.	Total 0.0

## 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.