



Enhancements to the Penn Marketplace

Monday, May 07, 2018

Welcome to this *Penn Marketplace Enhancements Update*, which provides relevant updates and coaching tips regarding Penn Marketplace. Please review the information below as it can enhance your experience in working with the new system to onboard new suppliers or complete Non-PO Payment Requests.

Minimizing New Supplier Request Delays: Conducting a Supplier Search

It is extremely important for Penn users to **complete a supplier search** before entering a New Supplier Request to avoid requesting suppliers who are already present in Penn Marketplace. These duplicate requests can ultimately delay processing of a supplier's registration. As noted last week, the full functionality of the supplier search was temporarily limited due to an issue found in the system. **A solution to the issue has been found and the supplier search has been fully restored.**

Please complete the supplier search by selecting the "Suppliers" icon and then "Supplier Search" on the left-hand navigation on the Penn Marketplace homepage. The results will indicate whether the supplier is available for users to create POs or Non-PO Payment Requests (indicated by a **green** check mark). If the supplier is not available in the Marketplace, their registration status in the portal will show where they are in the registration process.

Users can do business with existing suppliers in Penn Marketplace who have not had the opportunity to register in the portal yet. Nonetheless, if an existing supplier would like to register before receiving an invitation from Purchasing Services, the Penn user should email the supplier's contact information to SupplierSupport@upenn.edu and request that an invitation is extended to the supplier. **Please do not complete a New Supplier Request form for an existing supplier.**

New Supplier Addresses

A common question has arisen about how new remit-to or fulfillment addresses can be added for existing suppliers. It is a best practice for suppliers to update addresses in their profile which they can do any time after registering in the portal. If an existing supplier approved in BEN has not been registered to access the Penn Marketplace portal, a Penn user should request Supplier Support (SupplierSupport@upenn.edu) to send an invitation to register. If it is extremely time sensitive, the user can provide [Supplier Support](#) with the supplier's name, BEN number and address to add to the supplier's record. For security reasons, users in Penn's Schools and

Centers do not have the ability to input new remit-to or fulfillment addresses onto supplier records.

Foreign Suppliers

Foreign suppliers, which are either Non-US based entities or foreign individuals, registering in the portal will be prompted to upload their W-8 into the system. If the supplier is providing services in the United States, the system will also require a copy of a passport. If the supplier is providing services outside the United States (U.S.), the supplier will be prompted to upload a Certificate of Foreign Income.

If Penn users are authorizing payments to foreign suppliers via a Non-PO Payment Request, **the Penn user is responsible for uploading specific documents related to the services being paid for onto the Request that includes:**

- A Certificate of Foreign Income Form, if work is performed outside the U.S.
- The Foreign Information Form and Stamp of Entry (I-94) if work is performed inside the U.S.

Non-PO Payment Requests

Selecting an Approving Org

When completing a Non-PO Payment Request, Preparers should ensure that the Approving Org, as indicated on the top of the “Codes” page, is accurate. As a reminder, the Approving Org is used to route the Non-PO Payment Request through the approval hierarchy. This is distinct from the ORG value in the 26-digit Chart of Account String on the Non-PO Payment Request. The Chart of Account string is used when the expense for this Non-PO Payment request is recorded in BEN.

LINE	APPROVING ORG	Note To Approver (100 Char. Max)
	4102 BB-ADMIN	

LINE	CNAC	ORG	BUDGET CHK	FUND	OBJECT	PROGRAM	CENTER REF-CNAC
	400 MED-UR	4009 SM-SN-BOS	4 RTO/CNAC/ORG/FUNDICREF	599999 G&C ADJUSTMENT	5339 EXT GTH SVCS	2813 REPRO BIO	0000-400 UNDEFINED

Review of Non-PO Payment Requests

Once a Non-PO Payment Request has received all of the necessary approvals in a School or Center, it is marked as “Ok to Pay.” Then it is sent from Penn Marketplace to BEN overnight to be queued up for payment.

Invoice Review & Finding Attachments

Once a Non-PO Payment Request is approved by the Level 1 Approver, it goes from being a form request to an invoice in Penn Marketplace. If the Request is over \$5,000, the Level 2 Approver will be sent an Invoice to approve. If the Level 2 Approver would like to review the actual form request (with attachments) that the Preparer created, he or she should **scroll down to the bottom** of the “Invoice Summary” page and then click on the blue link on the left-hand side of the page to view the Non-PO Payment Request form and attachments. In addition, any user searching for invoices in “Document Search” can use this same link to view the Non-PO Payment Request forms and attachments.

SP Payment Requests

SP Payment Requests follow a different approval hierarchy than standard Non-PO Payment Requests. When preparing SP Payment Requests, SP Preparers must select the SP Payment Request form. They then must check the box named “Skip the School & Center Hierarchies” on the “Additional Information”, Special Routing Instructions section of the Request. This checkbox indicates that the Request should follow the SP Approval Hierarchy. Omitting this check box will lead to delays in the approval process for a SP Payment Request. A helpful Quick Reference Guide that provides an overview of SP Payment Requests can be found on the [Reference Guides](#) page on the Penn Purchasing Services website.