

## **Business Entity/Independent Contractor Resource Guide**

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## Registration

These instructions are offered as guidance for completing your Business Entity/Independent Contractor Supplier Registration and Portal Information. Upon receipt of a Supplier/Payee registration invitation from University of Pennsylvania (support@sciquest.com), new suppliers may register in the supplier portal also known as Penn Marketplace, at which time you will receive your login credentials. Once you have been approved by Procurement Services and your account has been created in Penn's financial system, you can login to update your information at

https://solutions.sciquest.com/apps/Router/SupplierLogin?CustOrg=UPenn.



#### Supplier Invitation for University of Pennsylvania

Dear NEW COMPANY,

University of Pennsylvania

Please take a moment to complete your registration. By selecting the "Register Now" button below, you will be routed to a secure website to complete the registration process. Upon successful completion of your registration, you will have access to your secure portal where you can add additional details about your organization, invite colleagues to become users in your site, and more. Any users added to your site are required to follow federal guidelines and best practices associated with securing and protecting confidential banking information and data.

**Register Now** 

Thank You,

University of Pennsylvania

If you have any technical questions, please contact Procurement Services Operations Center at SupplierSupport@upenn.edu or +1 215-898-7216 for assistance and identify yourself as registering in the University of Pennsylvania Supplier Network.



**Registration Checklist** 

Welcome to Supplier Registration

ENGLISH -

**Registration FAQ Registration Tutorial**  Thank you for your interest in doing business with the University of Pennsylvania. In order to become an approved supplier with the University, you must:

1. Review the University's standard terms and conditions: PO Terms and Conditions 2. Review the University's Supplier Code of Conduct

3. Complete the registration information in the Penn Marketplace portal, upload IRS Form W-9 (Form W-8 for foreign suppliers)

Enter your login credentials and click Login. If you have forgotten your password, click on Trouble logging in? at the bottom of the login page.



Welcome to the University of Pennsylvania Penn Marketplace Supplier Portal. Please log in with your provided login and password.

Any issues related to logging in or technical issues, including attachments, questions can be addressed byour third party software host, Jaggaer (formerly SciQuest) Supplier support team at 1-800-233-1121 or via a Support form: http://go.sciquest.com/SupplierSupportRequest.html.

Account created successfully.
Please log in to complete registration.
Email XXXXXXXXX@gmail.com
Password ••••••
LOGIN TROUBLE LOGGING IN?

#### Exhibit A – Overview

ENGLISH -

You will be guided through a step-by-step registration process as
indicated in the left-hand navigation path (Exhibit A). The green
check mark indicates your completion of that section. A greyed-
out check mark indicates there is missing information and needs
your attention before your registration is complete and ready for
submittal to Penn

Welcome	
Company Overview	~
Business Details	-
Addresses	~
Contacts	~
Diversity	~
Insurance	~
Payment Information	~
Tax Information	~
UPenn Terms and Condi	~
Certify & Submit	

Note: each step of the registration process is outlined below. As you move through the registration process, your information is automatically saved once you hit the "NEXT" button on the bottom on the screen.

## Welcome

Here you will find information related to the registration requirements and information you will need during the registration process.

• Enter you Legal Company Name or Your Individual Name -

\*Name as it will appear on Purchase Orders and Payments

COMPANY NAME		Welcome to Supplier Registration	?
Registration <b>In Progress</b> for: University of Pennsylvania <b>1 of 9</b> Steps Complete		Thank you for your interest in doing business with the University of Pennsylvania. In order to become an approved supplier with the University, you must: 1. Review the University's standard terms and conditions: PO Terms and Conditions	
Welcome		<ol> <li>Review the University's <u>Supplier Code of Conduct</u></li> <li>Complete the registration information in the Penn Marketplace portal, upload IRS Form W-9 (Form W-8 for foreign suppliers)</li> </ol>	
Company Overview	~		
Business Details	~	Required to Start Registration	
Addresses	~	Legal Company Name * COMPANY NAME	
Contacts	~		
Diversity	~		
Insurance	1		
Payment Information	~		
Tax Information	~		
UPenn Terms and Conditi	~		
Certify & Submit			
Registration FAQ   View History		★ Required to Complete Registration Next > Save Chan	ges

• Click "Next" to continue

## **Company Overview**

Enter details about your company:

- Does your business have a DUNS (Data Universal Numbering System) number? Y/N
- Enter your DUNS number as needed
- Enter your legal structure
  - The legal structure entered will determine whether any tax documents will be required as part of the registration process
- Enter your Tax ID Number (domestic or foreign suppliers). For independent contractors, enter your SSN.
- Website (If applicable)
- If you are doing business as an Independent Contractor, upload your required W-9

NEW COMPANY		Company Overview	?
Registration <b>In Progress</b> for: University of Pennsylvania		The information entered on this page allows us to track general information about your company to ensure we have the most up-to-date information in our system.	
1 of 9 Steps Complete		Does your business	
Welcome		Does your business   Yes No have a DUNS number?*	
Company Overview	~	The Data Universal Numbering System or DUNS Number is a nine-digit identification number assigned to over 100 million businesses worldwide.	
Business Details	~	Need a DUNS Number? Visit Get a D&B Number to obtain more detailed instructions on applying for your DUNS Number.	
Addresses	~	visit det a bed Rumber to obtain more detailed instructions on appying for your borts Rumber.	
Contacts	~	Dun & Bradstreet Number (DUNS) *	
Diversity	~		
Insurance		Legal Structure * 💿	
Payment Information	~	Tax ID Number *	
Tax Information	~	Website	
UPenn Terms and Conditi	1		
Certify & Submit			
Registration FAQ   View History		★ Required to Complete Registration	ges

• When registering as an Individual/Sole Proprietor, please answer Additional Question

Builder, Bob		Company Overview	2
Registration <b>In Progress</b> for: University of Pennsylvania		The information entered on this page allows us to track general information about your company to ensure we have the most up-to-date information in our system.	
2 of 9 Steps Complete			
Welcome		Dees your business Ves No have a DUNS number? *	
Company Overview	×	Legal Structure * 💿 Individual/Sole Proprietor -	
Business Details	~	Tax ID Number Type 💿 Employer Identification Number 🏱	
Addresses	~	Tax ID Number * 945231111	
Contacts	~	Website	
Diversity	$\checkmark$		
Insurance	1	Additional Questions	
Payment Information	~	State in which services are rendered	
Tax Information	× .		
UPenn Terms and Conditi	~		
Certify & Submit		★ Required to Complete Registration	nges

• Click "Next" to continue

#### **Business Details**

Information in this section is related to your company's type of services/goods provided:

- NAICS (North American Industry Classification System)
  - Use the search feature to best determine your NAICS code by entering a keyword related to your type of business

5 ]-

• Example: Search "website design"

- 239XXX -
- Commodity Code
  - Select from the drop-down list for internal codes used by the University of Pennsylvania
- Click "Next" to continue

COMPANY NAME		Business Details			
Registration <b>In Progress</b> for: University of Pennsylvania <b>1 of 9</b> Steps Complete		provide. Additionally, this data is used	to track important details about your company, such a to determine whether or not your business meets the s based on your NAICS code and annual revenue, or nur	small business size standards as defined b	
Welcome		Products and Services			
Company Overview	~	NAICS Codes *	No Primary NAICS Code Selected	Edit	
Business Details	~	Below are the commodity codes that	the University of Pennsylvania uses for describing the <u>c</u>	goods and services that you provide.	
Addresses	~	Commodity Codes *	_	Edit	
Contacts	~	-			
Diversity	~				
Insurance	×				
Payment Information	~				
Tax Information	~				
UPenn Terms and Conditi	~				
Certify & Submit					
legistration FAQ   View History		$\star$ Required to Complete Registration		< Previous	Next > Save Change

#### Addresses

At least one fulfillment (order) and one remittance address is required to complete the registration. If there are multiple fulfillment (order) or remittance addresses, please indicate ONE as the primary address for both the fulfillment and remittance addresses.

- Click "Add Address"
  - In the required field "What would you like to label this address?" enter a title (label) for the address
  - Check appropriate boxes indicating which activities take place at this address.
     Select all that apply (Takes orders, fulfillment) or Receive Payments (remittance)
- Click Next to "Address Details"
  - From the drop-down box, select how you would like to receive Purchase Orders; Email or FAX
  - Complete the details of the address as required
- Click Next to "Primary Contact for this Address"
  - Enter a **Contact** or select **Not Applicable**
  - Additional contacts for remittance questions and sales rep should be included if applicable

- Assign the address to a location. For each unique fulfillment (order) address, you must create a unique location. You can associate the same remittance address to one or more locations
  - Use existing location, pick location from the drop-down box
  - o Enter New location in the required field "What would you like to label this location"
- Click "Next" to continue

NEW COMPANY	Addresses
Registration <b>In Progress</b> for: University of Pennsylvania <b>2 of 9</b> Steps Complete	Please enter any physical or mailing addresses from which your organization does business to help us route information and communication correctly. Any required address types are listed below.
Welcome Company Overview Business Details Addresses	Please use no more than fifteen characters for your address label. The format should be [10 character long string]-[4 digit numeric value] Example: CITY-0001 Be advised. When you add an address, it is automatically set as the Primary Address. Once you add additional addresses, you can determine which address you want to use as your Primary. If you make a remit address inactive that is tied to a payment type we have on file, you will need to go back to that payment type and choose a new remit address. This
Contacts Diversity Insurance Payment Information Tax Information UPenn Terms and Conditi Certify & Submit	will enable you to get paid appropriately. If you see a yellow, warning icon, that means there is information that is required that you have not filled out. Please check your entries to make sure this is not the case. Otherwise you will receive an error message when you try to submit your registration. Required Information The following address types are required to complete registration: <ul> <li>Fulfillment</li> <li>Remittance</li> </ul> No addresses have been entered Hide Inactive Addresse
Registration FAQ   View History	< Previous Next >
Basic Information (Step	1 of 3) ?
What would you like to label	
Which of the following busin ☑ Takes Orders (fulfillme ☑ Receives Payment (ref	

\* Required to Complete Registration

7

Next >

#### **Add Address**

Address Details (Step 2)	of 3)		?
How would you like to receive purchase orders for this fulfillment address? ★	Email	~	
Email Address ★			
Confirm Email *			
Country *		~	
Address Line 1 *			
Address Line 2			
Address Line 3			
City/Town *			
State/Province			
Postal Code			
Phone		ext.	
	International phone numb	ers must begin with +	
Toll Free Phone		ext.	
	International phone numb	ers must begin with +	
Fax			
	International phone numb	ers must begin with +	
* Required to Complete Registrati	ion	< Previous Ne	ext >

 $\times$ 

 $\sim$ 

#### Add Address

Primary Contact For Th	is Address (Step 3 of 3)	?
You can also update and add	d Contacts later from the Con	tacts page.
Enter New Contact O N	lot Applicable	
Select additional contact type(s) to apply	<ul> <li>Takes Orders (fulfillment)</li> <li>Receives Payment (remit)</li> <li>PO Failure</li> </ul>	
Contact Label *		
First Name *		
Last Name 🕇		
Position Title		
Email *		
Phone *		ext.
	International phone numbers m	ust begin with +
Toll Free Phone		ext.
	International phone numbers m	ust begin with +
Fax		
	International phone numbers m	ust begin with +
Required to Complete Registrati	on	Save Changes

#### Indicate Primary Fulfillment and Remittance if you have more than one.

Hide Primary Sett	ings		
Primary Fulfill	ment	Yes	⊖ No
Primary Remi	ttance	Yes	○ No
Primary Contact For T	his Address (Step 3 d	of 3)	?
You can also update and a	dd Contacts later from th	ne Contacts page.	
Enter New Contact	Not Applicable		
Select additional contact type(s) to apply	<ul> <li>X Takes Orders (fulfi</li> <li>✓ Receives Payment</li> <li>□ PO Failure</li> </ul>		
Contact Label *			
First Name *			
Last Name *			
Position Title			
Email *			
Phone *		ext.	
	International phone num	bers must begin with +	
Toll Free Phone		ext.	
Fav	International phone num	ibers must begin with +	
Fax	International phone num	bers must begin with +	
* Required to Complete Registri		evious Save Change	

## Contacts

Add contact information for fulfillment, PO failure, and remittance to complete your registration if it was not entered in the previous step.

- Click "Add Contact"
- Enter a title (label) for the contact and all pertinent information
- Click "Next" to continue

Please enter contact information for any individuals at your organization who may provide valuable information or help to our company. This will help us ensure we are always contacting the correct individual. Contacts can be linked to one existing address. Any required contact types are listed below.						
Contact Label	Contact Types	Name	Email			
Main	Remittance (Primary) Fulfillment (Primary)	Homick, Vira	homickv+newco@gmail.com	Edit		
Add Contact 👻				Show Inactive Contact		
Fulfillment						
PO Failure						
Remittance						

#### Diversity

Penn Procurement Services is committed to providing local and diverse businesses as much opportunity to compete for business as practically possible. As such we engage extensively with internal and external partners to help advance Penn's economic inclusion goals.

- Click "Add Diversity Classification" Enter multiple diversity codes as applicable
  - This <sup>1</sup> yellow warning symbol indicates you must specify your diversity information in the additional selections provided to complete this step.
  - Complete and upload additional information if you are a certified diverse supplier
- If you have a diversity classification that is not listed click on the box and free form • your classification in the OTHER DIVERSITY box.
- Click "Next" to continue

NEW COMPANY	Diversity
Registration <b>In Progress</b> for: University of Pennsylvania <b>4 of 9</b> Steps Complete	We strive to do business with diverse companies. By entering applicable diversity classifications, you will help us meet certain spending goals for The University of Pennsylvania.
Welcome	If you see a yellow, warning icon, that means there is information that is required that you have not filled out. Please check your entries to make sure this is not the case. Otherwise you will receive an error message when you try to submit your registration.
Business Details	Required Information Please click on the "Add Diversity Classifications" button to declare any Diversity Classifications that are applicable to you or to state that you do not qualify.
Contacts	Click the button below to choose the diversity classifications that apply to your business.
	Add Diversity Classifications
Payment Information	Additional Questions
Tax Information	Do you have a diversity classification that is not listed?
UPenn Terms and Conditi	
Certify & Submit	
Registration FAQ   View History	< Previous Next > Save Changes

#### **Additional Questions**

Do you have a diversity classification that is not listed?	
--	--

fyou do not classify as any of the diversity classes that were provided, please indicate below what your diversity classification should be.					
OTHER DIVERSITY (Please provide description) *					
	< Previous	Next >	Save Changes		

#### **Diversity Classification**

**Additional Information** 

Alinority Business Enterprise (MBE)

Add Diversity Classifications

• If Minority Business Enterprise (MBE) was selected click on MBE link and indicate Ethnicity from drop down.

Edit Diversity	×
Diversity Classification $\star$	Minority Business Enterprise (MBE)
Ethnicity *	African American
Are you certified by a certifying agency? $\star$	⊖ Yes ⊖ No
★ Required to Complete Registration	Save Changes Close

• If certified by an agency, please include additional information and upload current certificate.

Edit Diversity		×
Diversity Classification $\star$	Minority Business Enterprise (MBE)	
Ethnicity *	African American	
Are you certified by a certifying agency? $\star$	● Yes ○ No	
Certification Type $\star$	×	
Expiration Date *		
	mm/dd/yyyy	
Certification Number		
Upload Certificate *	Select file	
* Required to Complete Registration	Save Changes	Close

#### Insurance

Penn requires outside parties providing services to the University or using University facilities to provide evidence of insurance. With the acceptance of the <u>University's PO terms and</u> <u>conditions</u>, and upon request, Supplier shall furnish to Buyer a current certificate of insurance for each of the policies required. Alternatively, you can upload the appropriate insurance requirements in the portal.

- Click "Add Insurance" and enter all the required information
- Repeat for additional insurance
- Click "Next" to continue

#### Additional Insurance Requirements

If you provide catering services to the University, you will be required to carry the following insurance coverage: General Liability, Automobile Liability, and Worker's Compensation Insurance. Upload the ACORD Certificate of Liability Liquor Liability insurance if you will serving alcoholic beverages.

Company Overview	1					
Business Details	×	No Insurance has been entered.				
Addresses		Add Insurance 👻				
Contacts						
Diversity		Additional Questions				
Insurance	~	Your registration response indicates that you provide catering services to University of Pennsylvania. Purchasing Services has the responsibility of maintaining the University's approved caterers list and therefore must obtain all required insurance certificates prior to accepting your company on into our approved database. Please upload your current				
Payment Information	$\checkmark$	ACORD insurance certificate that meets or exceeds the listed University insurance requirements.				
Tax Information	~	Certificates of insurance for General Liability and Auto Liability must name the TRUSTEES OF THE UNIVERSITY OF PENNSYLVANIA as an additionally insured with respect to services provided under purchase order agreement.				
UPenn Terms and Conditi	~	Please be advised that you are not permitted to provide catering services on the University of Pennsylvania campus without completion of your registration and upload of				
Certify & Submit		nsurance certificates. ist of required Insurance certificates:				
Registration FAQ   View History		1. General Liability insurance: (REQUIRED) - Comprehensive general liability with broad form property damage - \$1,000,000 per person, per occurrence and property damage. 2. Automobile Liability Insurance: (REQUIRED) - Comprehensive liability on all autos \$1,000,000 per person, per occurrence and property damage. 3. Workers Compensation Insurance: (REQUIRED) - \$500,000 limit - Statutory limit covering all officers, employees, or agents. 4. Liquor Liability Insurance (If applicable): - \$1,000,000 minimial limit ACORD Certificate of Liability *  Select file				
		< Previous Next > Save Changes				

## **Payment Information**

Please provide a single preferred method of payment associated to the remittance address.

- Payment methods include: ePayables 10 days, ACH 30 days, and Check 45 days
- All *individuals* will **remain** on immediate terms; therefore, this change primarily impacts PO suppliers that are business entities

- Click "Add Payment Information" Select from drop-down box: ePayables (Virtual Payment), ACH, or Check
- Add Payment Information (ACH)
  - o Create Payment Title of your ACH account
  - o Enter Electronic Remittance Email for notification
  - Enter Bank Account Details
    - Enter Bank Bank name, Account Holder's Name, Account type, Routing Number, and full address
- Add Payment Information (ePayables)
  - o Enter payment title of the ePayables account
  - o Enter Electronic Remittance email address
- Add Payment Information (Check)
  - Enter Payment title
- Click "Next" to continue

NEW COMPANY		Payment Information	?
Registration <b>In Progress</b> for: University of Pennsylvania <b>5 of 9</b> Steps Complete		Information on this page is used to determine how and where you will receive payment. Please enter an email address if you wish to receive an email notification regarding payments including invoice, date, and amount.	
Welcome		ePayables - Penn has partnered with Bank of America to offer a card payment program. This payment method reduces the amount of time to pay suppliers. Payment terms are fixed at net 10 days/approved invoice. Payments will be processed as credit card transactions. Standard merchant fees will apply.	
Company Overview		ACH – Automated Clearing House, is an electronic network for financial transactions in the U.S. ACH payments are made directly to the supplier bank account set up on the Penn portal. Payment terms are fixed at net 30 days/approved invoice.	
Business Details	*	Wire – A method of electronic fund transfer. This method of payment is reserved for Penn's international suppliers, to their bank account set up on the Penn portal. Payment terms are fixed at net 30 days/approved invoice. Special approval must be granted by Purchasing for any domestic U.S wires.	
Addresses	1	Check – Penn's least favored method of payment. Suppliers are encouraged to change to a more efficient electronic payment method. Payment terms are fixed at net 45 days/approved invoice.	
Contacts	1	Individual Payee – Payment Terms are set to Immediate pay upon receipt of approved invoice.	
Diversity	1	If you see a yellow, warning icon, that means there is information that is required that you have not filled out. Please check your entries to make sure this is not the case. Otherwise you will receive an error message when you try to submit your registration.	
Insurance	~		
Payment Information	~		
Tax Information	~	Required Information At least one payment type is required to complete this section.	
UPenn Terms and Conditi	~		
Certify & Submit		No payment information has been entered. Add Payment Information	
Registration FAQ   View History		Direct Deposit (ACH) Check (Check) Wire Transfer	t >
		ePayable	

• For Direct Deposit

Add Payment	Information	×
Payment Title *		^
Payment Type *	Direct Deposit (ACH)	
Direct Deposit Format	~	
Remittance Address *	· ·	
Electronic Remittance Email *		
Currency *	·	
Active	● Yes ○ No	
Bank Account		
Country *	~	
Bank Name *		
Account Holder's Name ★		
Account Type ★	~	
Address Line 1		
Address Line 2		
Address Line 3		
* Required to Complete Registra	Save Changes	Close

• For Check

Add Payment	Info	rmati	on		×
Payment Title <b>*</b>					
Payment Type ★	Check (	Check)			
Remittance Address *				~	
Electronic Remittance Email					
Currency *				~	
Active	Yes	0 <b>No</b>			
Required to Complete Registra	tion		Save Cha	anges	Close

• For Wire Transfer – International Suppliers/Payees

Add Payment	Information	×
Payment Title <b>*</b>	[	
Payment Type ★	Wire Transfer	
Remittance Address *	×	
Electronic Remittance Email *		
Currency *	×	
Contact Name		
Purpose		
	یعار 200 characters remaining	
Active	● Yes ○ No	_
Bank Account		
Country *	v	
Bank Name ★		
Account Holder's Name *		
Account Type *	~	
★ Required to Complete Registra	tion Save Changes Clo	se

• For ePayables

Payment Title *			
Payment Type ★	ePayable		
Remittance Address $\star$		~	
Electronic Remittance Email			
Currency *		~	
Active	● Yes ○ No		
* Required to Complete Registrat	ion	Save Changes	Close

## Tax Information

Please complete appropriate tax forms as governed by the IRS. For more information as to how to complete a W-9 or W-8 form, please visit <u>www.irs.gov</u>.

Domestic and Foreign Suppliers, and Independent Contractors must provide a current tax document.

You can upload a complete and signed tax document by clicking "Upload" or you can e- Certify using your supplier portal password in lieu of posting a signed document.

By using the system-generated tax document, your previously entered registration information will prepopulate into the appropriate areas of the tax document.

- Click "Add Tax Document"
  - Select your document type from the drop-down list
- Click "Download Pre-Populated Tax Document"
  - Save the completed file on your computer (Note: do not insert signature follow the remaining instructions for your signature)
- Enter Tax Document Name Ex. W-9-2018
- Enter Tax Document Year from dropdown list
- Click "Upload" to upload your Tax Documentation
  - o Enter title
  - o Click "Browse" to locate the file on your computer to include
  - Click "Add"
- Click "Save Changes," then "Next" to continue

#### **Tax Information**

Tax information is used for payment and the tax document should be uploaded using a PDF format.

 Required Information

 At least one tax document is required to complete this section.

No tax information has been entered



#### Add Tax Document

Тах Туре 🕇	W-9	
Tax Document Name 🖈	W-9	
Tax Document Year	2018	~
Tax Documentation *	Select file	Done ⊘
	W- 9 2018.docx	<b>↓</b> 100% ×
	L Download Pre-populated 1	ax Document
* Required to Complete Registr	ation	Save Changes Close

# Accept University of Pennsylvania's Purchase Order Terms and Conditions

×

NEW COMPANY		UPenn Terms and Conditions
Registration <b>In Progress</b> for: University of Pennsylvania <b>7 of 9</b> Steps Complete		I, the undersigned as an authorized representative of the company listed above, agree to the University of Pennsylvania Purchase order Terms and Conditions, unless a contract stating complete alternate terms of agreement has been executed by authorized representatives of the parties, reference herein and certify that the information provided to the University of Pennsylvania is current and accurate. I agree to allow the University of Pennsylvania to access my company's tax compliance status with the
Welcome		City of Philadelphia using the city's Tax Clearance System.
Company Overview	1	De serve serve sitte de la la serve de contra la contra de la serve de la serve de la serve de la serve de la s
Business Details	1	Do you agree with the University of Pennsylvania's Terms and Conditions listed above? ★ ○ Yes ○ No
Addresses	1	
Contacts	1	
Diversity	1	
Insurance	~	
Payment Information	1	
Tax Information	1	
UPenn Terms and Condi	~	
Certify & Submit		
Registration FAQ   View History		★ Required to Complete Registration

If you are proposing alternate terms, select your file and upload for review by Procurement Services.

NEW COMPANY		UPenn Terms and Conditions
Registration <b>In Progress</b> for: University of Pennsylvania <b>7 of 9</b> Steps Complete		I, the undersigned as an authorized representative of the company listed above, agree to the University of Pennsylvania Purchase order Terms and Conditions, unless a contract stating complete alternate terms of agreement has been executed by authorized representatives of the parties, reference herein and certify that the information provided to the University of Pennsylvania is current and accurate. I agree to allow the University of Pennsylvania to access my company's tax compliance status with the
Welcome		City of Philadelphia using the city's Tax Clearance System.
Company Overview	<	Do you agree with the University of Pennsylvania's Terms and Conditions listed above? *
Business Details	<	Yes      No
Addresses	<	
Contacts	<	If you are proposing alternate terms of agreement, please attach the document here with changes highlighted. $\star$
Diversity	<	Select file
Insurance	~	
Payment Information	<	
Tax Information	×	
UPenn Terms and Condi	~	
Certify & Submit		
Registration FAQ   View History		★ Required to Complete Registration

## Certify & Submit

Once all required fields have been successfully completed and you have agreed to the certification statement, you will be prompted to enter the Preparer's Name, Title and Email address for validation and

- Click the box for "I certify that all information is true and accurate"
- Click "Submit"

You will receive an email from Penn when you have successfully completed all the registration information. Your registration information will be reviewed by the supplier support team for approval into the University's supplier database. If additional information is needed, you will be contacted by the Supplier Support team. Penn's approval of your registration should be completed within two business days. Once you have been approved, you will see the supplier number in your profile page on the portal under your company name.

NEW COMPANY		Certify & Submit			?
Registration <b>In Progress</b> for: University of Pennsylvania <b>9 of 9</b> Steps Complete			nformation is correct. It is the supplier's/	an authorized official of the registering supplier or an individual representing yo individual's responsibility to ensure that the information provided is accurate and	
Welcome			nis registration, you certify that all inform company from doing business with Penr	nation provided is true and accurate. Knowingly providing false information may	represent fraud and
Company Overview	× .				
Business Details	×	Preparer's Initials *	N C		
Addresses		Preparer's Name *	NEW COMPANY		
Contacts	×	Preparer's Title *			
Diversity	×	Preparer's Email Address *			
Insurance	×	Today's Date	3/9/2018		
Payment Information		Certification $\star$	☑ I certify that all information provide	d is true and accurate.	
Tax Information	×				
UPenn Terms and Conditi	1				
Certify & Submit					
Registration FAQ   View History		★ Required to Complete Reg	gistration		Submit

#### Thank You for Registering

Registration Complete for NEW COMPANY!

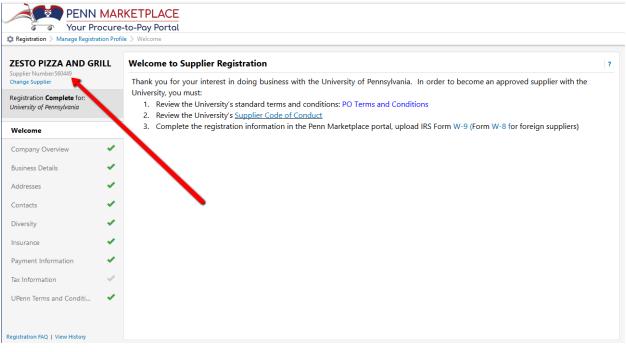
#### Next Steps

- You will receive a confirmation email with information on what to expect next.
- Bookmark this site in your browser so you can easily make updates to your business profile.
- Send new user request to an additional portal user.
- Return to the homepage and check for any other outstanding tasks.
- Return to Registration Profile

#### Click "Manage Registration Profile"

łome > Customer Portal Home マ > Home - ZESTO PIZZA A	ND GRILL	
Velcome to the Penn Marketplace Supplier Portal!!	Quick Links to	Common Tasks
supplier Registration is required for new suppliers is a orerequisite for doing business with the University of ennsylvania, and should not be interpreted as a	Manage Registratio	n Profile
nethod of becoming a preferred supplier.	Create Invoice	/ Credit Memo
Suppliers that were previously registered with the Jniversity but have had their information deactivated due to lack of use (supplier information is end date in	Туре	Invoice O Credit Memo
bur system if the supplier has not been used with 18 nonths) will need to register again and provid updated information.	Invoice No.	
Registered UPENN suppliers and payee may access he secure portal at any time to maint in payment	Invoice Date	02/12/2018
nformation, update contact, insurar and tax nformation.	Supplier PO Number	ZESTO PIZZA AND GRILL
Companies/Individuals may up the portal to access and review purchase orders, generate and submit ectronic invoices to the University.	Currency	Optional PO Number
When viewing your invoices, you will see a status next		Create
o each of them. Below is an explanation of each of the tauses you might see:		
• In Process - The invoice has not been	Find Invoice	
<ul> <li>processed, but has been created.</li> <li>Payable - The invoice has been processed and marked as Payable (OK to pay)</li> <li>Paid - the invoice has been processed and marked as paid.</li> <li>Cancelled - the invoice was canceled.</li> </ul>	"Search" button.	Advanced Searc atus of an invoice or send a message to a customer regarding an invoice, please enter the invoice number then click the Number(s) Search
or registration questions, please contact Procurement ervices Operations Center at		

## When you have been approved, you will see the BEN supplier number indicating you are an approved supplier at Penn.



Reviewing Profile Information in Penn's Supplier Portal	Reviewing	Profile	Information	in Penn'	's Supp	lier Portal
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PENN MARKETPLACE	Other Diversity 🔻 🃁 🔺
Your Procure-to-Pay Portal      Documents > Document Search > Search Documents > Document Search	Other Diversity
Search Sales Orders Enter search terms such as document numbers, Go to: advanced	

## Supplier PO-Flip functionality

- Creating a PO Invoice from the Supplier Homepage (Option 1)
  - Suppliers can create an invoice from the supplier portal homepage by using the Create Invoice/Create Credit Memo widget in the center of the homepage.
  - To create the invoice, the supplier must enter an Invoice Number of their choosing and enter the PO Number and then click "Create."
  - Suppliers should note that although the PO number is labeled "optional," Penn requires that this field be filled in accurately to create a PO Invoice. Non-PO Invoices cannot be submitted to Penn through the supplier portal.

Home > Customer Portal Home      Home - Garcia-Purvis Food	l Industries, Rob				
Welcome to the Penn Marketplace Supplier Portal!!	Quick Links to	Common Tasks	1		
Registered UPENN suppliers and payees may access the secure portal at any time to maintain information, such	Manage Registration	n Profile			
as addresses, payment information, and tax information.	<u>&gt;</u>				
Companies/Individuals may use the portal to access and review purchase orders, generate and submit electronic	Create Invoice	/ Credit Memo	1		
invoices to the University.	Туре	Invoice      Credit Memo			
When viewing your invoices, you will see a status next to each of them. Below is an explanation of each of the statuses you might see:	Invoice No.	FDG02022018-1			
In Process - The invoice has not been processed, but has been created.     Payable - The invoice has been processed and	Invoice Date	02/02/2018			
marked as Payable (OK to pay) <ul> <li>Paid - the invoice has been processed and</li> </ul>	PO Number	Optional PO Number			
marked as paid. • Cancelled - the invoice was canceled.	Currency	US Dollar 🔻			
For registration questions, please contact Procurement Services Operations Center at SupplierSupport@upenn.edu.			Create		
	Find Invoice				
Customer Contact ?			Advanced Search		

- PO-Flip functionality from Sales Order History tab (Option 2)
  - Select "Document"> "Sales Order and Shipments" > "Sales Order History" and search by the different criteria available

n Home		ARKETPLACE						Renee Smith 🔻 🏴 🌲 2
Documents	Documents	ure to Dev Dertel						
	Documents Document Search	Sales Orders and Ship	ments					
🔔 Report		Sales Order History				2		
Registration	Sales Orders and Shipments Sales Invoices	Download Sales Order E	port Files					
	interpreted as a method of bec	amina a sectored						
	supplier.		Create Invoice / Cred	lit Memo		7		
	Suppliers that were previously University but could be inactive lack of use (supplier informatic system if the supplier has not	registered with the e in our system due to on is end dated in our been used within 18		Invoice   Credit Memo				
	months) will need to register a updated information.	again and provide	Invoice No.					
	information. Companies/Indiv	Registered Penn suppliers and payees may access the secure portal area virtum to maintin payment information, update constat, insurance and tax the secure portal and writely update the secure penetra backets and writely update orders generates and submit electronic invoices and check on payment status. When viewing your invoices in the portal, you will see a status next to each of them. Below is an explanation of each of the statuse you might see		02/20/2018				
	generate and submit electronic on payment status.			ZESTO PIZZA AND GRILL				
	explanation of each of the stat			US Dollar V		_		
	<ul> <li>In Process - The invoi processed, but has been</li> <li>Payable - The invoice</li> </ul>	h created. has been processed				Create		
	<ul> <li>and marked as Payable</li> <li>Paid - the invoice has b marked as paid.</li> <li>Casesilad - the invoice</li> </ul>	been processed and	Find Invoice			2		
	Cancelled - the invoice Suppliers can either submit the portal or can email them to ap	eir invoices via the	button.		regarding an invoice, please enter the in	Advanced Search woice number then click the "Search"		
	with the following provisions:     Include the PO number     Provide one (pdf only) fit	on each invoice ile per invoice (# of	Invoice Number		Search			
Menu Search (Alt+M)	files per email is unlimit • All PO invoices to Penn v only	ed) will be sent via email						
(AIX+M)	For registration questions, plea Procurement Services Operation	ase contact ons Center					S Nee	d Help?
	at SupplierSupport@upenn.edu	44						
<ul> <li>Home</li> <li>Documents</li> </ul>		PENN MAR Your Procure- ument Search > Search		rder History				
Reporting								
Registration				P	urchase Order Identificati			
Veysuation					Purchase Order Number(s)			
				S	ales Identification			
					Sales Order Number(s)			
					Sales Invoice Number			
					External User			
				s	ales Order Information			
					Participant(s)	⊖ Any ⊖ Me ●	Pick	م
					Owner			م
					Approved By			م
					Date	Create Date V	All Dates 🗸	
					Total Amount			
					Supplier			2
					Fulfillment Center			م
				н	tem/Product Information			
					Catalog Number(SKU)			
					Product Description			
					Commodity Code Product Flags			
					Froduct riags	Controlled substanc     A Green	te 🗆 🚰 Energy Star 🗆 🔶 Hazardous material	
						Rad Minor	Radioactive	
						G Recycled	🗆 🚸 Select Agent	
						□ <del>S</del> Toxin		
Menu Searc	ch						Q Search	
	<							

• The Sales Order History displays the list of Sales Orders including details such as "Status," "Invoice/Credit Memo No," and "Order Total."

- If there are invoices that have been submitted against a specific sales order, they will appear in the "Invoice/Credit Memo No" column, click on the hyperlink to see further details, including invoiced amount against this particular Sales Order on this specific invoice.
- Use the search/filter options on the left-hand navigation to further refine the search results.

Documents     Reporting     Registration	Our Procure-to-F Comments Decomments Search Deco C Back to Edit Search Search Details Search Terms Customer(s) Upen		> Sales Order Hi	200 of 4361 Results age 200 🗸			All Dates				Create Im	oice V Go
	Search Details Search Terms Customer(s)	?	Results Per Pa	age 200 🗸			All Dates				Create Im	roice V Go
Registration	Search Terms Customer(s)	7	Results Per Pa	age 200 🗸			All Dates					
	Search Terms Customer(s)	?					Best match				(c) 0	1 v of 22 1 ?
	Customer(s)		Order No.			Soft by	Best match	~			nvoice/Credit Memo	0122 1 1
				PO No.	Date/Time	Supplier	Fulfillment Center	Customer	Owner	Status	No.	Order Total
			1721786 🕰	3937036-TEST- DEV1-02092018	PO Date: 1/8/2018 12:00 AM Created: 2/10/2018 3:08 PM Completed:	ZESTO PIZZA AND GRILL	Network Fulfillment Center 1	UPenn	KAREN L. 35852250 DEMOS	Partially Invoiced	CREDITTEST TESTZESTOPIZZA1	292.30 USD 🗆
	Filtered by		1721740	3936923-TEST-	PO Date: 1/8/2018 12:00 AM	PHILADELPHIA CATERING		UPenn	IKEILA 10283752 TURNER			136.00 USD
	Date Type: Create Date Date Range: All Dates			DEV1-02092018	Created: 2/10/2018 3:06 PM Completed:	COMPANY	Center 1					
			1721695 🖻	3936921-TEST- DEV1-02092018	PO Date: 1/8/2018 12:00 AM Created: 2/10/2018 3:06 PM Completed:	PHILADELPHIA CATERING COMPANY	Network Fulfillment Center 1	UPenn	IKEILA 10283752 TURNER			310.20 USD 🗆
	Refine Search Results Date Range All Dates	?	1721609 🕰	3936781-TEST- DEV1-02092018	PO Date: 1/8/2018 12:00 AM Created: 2/10/2018 3:05 PM Completed:	ZESTO PIZZA AND GRILL	Network Fulfillment Center 1	UPenn	RENEE 18802569 JOHNSON	Over Invoiced	TESTINGCREDIT TESTINV1 ZESTOTESTING	129.70 USD
	All Dates	T.	1721594 🕰	3936673-TEST- DEV1-02092018	PO Date: 1/8/2018 12:00 AM Created: 2/10/2018 3:04 PM Completed:	ZESTO PIZZA AND GRILL	Network Fulfillment Center 1	UPenn	NANCY 10080390 O'REILLY	Partially Invoiced	SAW123 TESTZESSAW	66.00 USD 🗆
	ZESTO PIZZA AND GRILL (1733)	Τ.	1721530 🕰	3936555-TEST- DEV1-02092018	PO Date: 1/8/2018 12:00 AM Created: 2/10/2018 3:02 PM Completed:	PHILADELPHIA CATERING COMPANY	Network Fulfillment Center 1	UPenn	MARIA 11872909 CRUDELE			127.00 USD
	No Invoice (4298) Partially Invoiced (33) Fully Invoiced (20) Over Invoiced (10)		1721521 🕰	3936498-TEST- DEV1-02092018	PO Date: 1/8/2018 12:00 AM Created: 2/10/2018 3:02 PM Completed:	PHILADELPHIA CATERING COMPANY	Network Fulfillment Center 1	UPenn	VICTORIA 10200092 REINHARDT	Partially Invoiced	PHILTEST	1,300.00 USD
Menu Search	Order Delivery History via sales order (4361)		1721512	3936452-TEST- DEV1-02092018	PO Date: 1/8/2018 12:00 AM Created: 2/10/2018 3:02 PM	ZESTO PIZZA AND GRILL	Network Fulfillment Center 1	UPenn	DEITRICE A 10032463 JOHNSON			183.39 USD 🗌
	Owner	<b>T</b> •		3936400-TEST-	Completed: PO Date: 1/8/2018.12:00 AM				STEVEN A 27089534 FALA	Partially	Need Help?	

- To create a PO Invoice from the Sales Order History screen, check the box next to the specific Sales Order to create an invoice. Once checked, click on the drop-down menu and select "Create Invoice" and "Go."
- Supplier can only create one PO Invoice at a time. Multiple Sales Orders (also known as purchase orders) cannot be selected.

07.2222741743	Your Procure-to-P	ay Portal									
Documents	Documents > Document Search > Search Documents	ments • > Sales Order	History								
Reporting	< Back to Edit Search Start New Search	Showing 1	200 of 4361 Results			All Dates				Create In	woice
Registration	Search Details	10	Page 200 🗸		Sort by	Best match	~				redit Memo
	Search Terms	Order No	PO No.	Date/Time	Supplier	Fulfillment Center	Customer	Owner	Status	Invoice/Credit Memo No.	Order Total
	Customer(s) UPenn	1721786	3937036-TEST- DEV1-02092018	PO Date: 1/8/2018 12:00 AM Created: 2/10/2018 3:08 PM Completed:	ZESTO PIZZA AND GRILL	Network Fulfillment Center 1	UPenn	KAREN L. 35852250 DEMOS	Partially Invoiced	CREDITTEST TESTZESTOPIZZA1	292.30 USD
	Filtered by	1721740	3936923-TEST-	PO Date: 1/8/2018 12:00 AM	PHILADELPHIA CATERING		UPenn	IKEILA 10283752 TURNER			136.00 USD
	Date Type: Create Date Date Range: All Dates		DEV1-02092018	Created: 2/10/2018 3:06 PM Completed:	COMPANY	Center 1					
		1721695	0, 3936921-TEST- DEV1-02092018	PO Date: 1/8/2018 12:00 AM Created: 2/10/2018 3:06 PM	PHILADELPHIA CATERING COMPANY	Network Fulfillment Center 1	UPenn	IKEILA 10283752 TURNER			310.20 USD
	Refine Search Results	?	3936781-TEST-	Completed:	ZESTO PIZZA AND GRILL	Network Fulfillment	110	RENEE 18802569 JOHNSON	Over		129.70 USD
	Date Range	1721609	DEV1-02092018	PO Date: 1/8/2018 12:00 AM Created: 2/10/2018 3:05 PM Completed:	25510 PIZZA AND GRIEL	Center 1	OPenn	NENEE 10002309 JUNI43014	Invoiced	TESTINGCREDIT TESTINV1 ZESTOTESTING	129.70 030
	All Dates 🗸	1721594	3936673-TEST-	PO Date: 1/8/2018 12:00 AM	ZESTO PIZZA AND GRILL	Network Fulfillment	UPenn	NANCY 10080390 O'REILLY	Partially	SAW123	66.00 USD
	Supplier PHILADELPHIA CATERING COMPANY (2628)	To	DEV1-02092018	Created: 2/10/2018 3:04 PM Completed:		Center 1			Invoiced	TESTZESSAW	
	ZESTO PIZZA AND GRILL (1733)	1721530	0, 3936555-TEST- DEV1-02092018	PO Date: 1/8/2018 12:00 AM Created: 2/10/2018 3:02 PM	PHILADELPHIA CATERING COMPANY	Network Fulfillment Center 1	UPenn	MARIA 11872909 CRUDELE			127.00 USD
	Invoicing No Invoice (4298)	10		Completed:							
	Partially Invoiced (33) Fully Invoiced (20) Over Invoiced (10)	1721521	3936498-TEST- DEV1-02092018	PO Date: 1/8/2018 12:00 AM Created: 2/10/2018 3:02 PM Completed:	PHILADELPHIA CATERING COMPANY	Network Fulfillment Center 1	UPenn	VICTORIA 10200092 REINHARDT	Partially Invoiced	PHILTEST	1,300.00 USD
	Order Delivery	1721512	3936452-TEST-	PO Date: 1/8/2018 12:00 AM	ZESTO PIZZA AND GRILL	Network Fulfillment	UPenn	DEITRICE A 10032463			183.39 USD
Menu Search (Alt+M)	History via sales order (4361)		DEV1-02092018	Created: 2/10/2018 3:02 PM Completed:		Center 1		JOHNSON			
	Owner	Te	3936400-TEST-	PO Date: 1/8/2018 12:00 AM	ZESTO PIZZA AND GRILL	Manual F. Millerard	110-00	STEVEN A 27089534 FALA	Partially	Need Help?	6

- Creating a PO invoice from Sales Invoice Document Search (Option 3)
  - The supplier should go to left-hand navigation and select "Documents," and then select "Sales Invoices," and finally "Create Sales Invoice."

n Home		PENN MARKETPL	ACE								•	Renee Smi	ith 🔻 🏴 🧍	
Documents	Documents					Handli	ng 0	.00						
Reputing		and Shipments Sales Invoices Create Sales Invo Create Sales Invo Create Sales Invoices C	voice			?								
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	Line Item Deta	ils											3	2
												Actions for Se	elected Items 👻	
	Invoice Line	PO No.	Order Line	Part No.	Description	Product Size	Quantity	Unit Price	Packaging	Extended Price	Tax, Shipping & Hand	ing		
	1	3936923-TEST-DEV1-02092018	1	1	Quote: 85291; Catering for PMI Speaker Matthias Rief lunch with grad students 1/8/2018 at 12:00pm in 600 CR8		136.0000	1.00	1/USD	136.00	show		ions 🔻 🗌	
Menu Search											ם דג גר	btotal count c1 c2 pping ndling	136.00 0.00 0.00 0.00 0.00 0.00	
(ver v m)			2									TAL	136.00 USD	
https://usertest.sc	iquest.com/app	s/Router/SalesInvoiceCreation	n:tmstmp=1	2131302/5	/047						S Ne	ed Help?		Γ

• Enter an invoice number and the PO number and click "Create" to create the invoice.

Create Invoice	/ Credit Memo	?
Type	Invoice     Credit Memo	
Invoice No.		
Invoice Date	02/20/2018	
Supplier	ZESTO PIZZA AND GRILL	
PO Number	Optional PO Number	
Currency	US Dollar V	
	Crea	ste

## Submitting the PO Invoice to Penn

- Add invoice number, select an option in the Remit-to Address Drop Down if it appears, and adjust the quantity or price, if necessary, at the bottom of the page.
- Optional fields such as uploading Supplier Attachments, inputting a Supplier Account Number, or adding Tax, Shipping, and Handling can be completed by the supplier if needed.
- Once the information on the invoice has been completed, select "Send to Customer" in the upper right-hand corner to submit the invoice to Penn for approval and payment.
- After invoice is submitted, confirmation of the details will appear.

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n Home		ARKETPL											Rene	e smith 👻 🏴 🦺	9
Documents	Ocuments > Document Search >	Search Documents		ales Invoice Unassigned											
10	Customer	UPenn													П
Reporting	Invoice Date	2/20/2018												-	
C Registration	PO Number	3936923-TES	T-DEV1-020	92018											
	Sales Order Number Supplier Attachments	1721740 add attachment	1												
	supplier reasonance	and anacomment.												Send To Customer	
	Invoice Messages History												Save	Send To Customer	
	Hide header													Hide value description	
		General Inform	ation	7		Billing	Information		7		Custo	mer Invoice Inform	ation	7	1
	Invoice Info				Billing Address				16 41	🔺 Customer in	voice information un	pdown in t			
	Create Date Invoice No.	2/20/201	8		ACCTS PAYABLE-UNIV C ROOM 440 FRANKLIN B	F PENN UILDING									
	Invoice Date	2/20/201	8	1	3451 WALNUT STREET PHILADELPHIA, PA 1910	4-6281			Addre	ss" sect	ion, the su	pplier shou	Id selee	t their	
		mm/dd/yy	09		USUS				correc	t remit-	to address	. If a suppl	er does	NOT see a	1
	Invoiced By Supplier	Renee Sm		ING COMPANY					-			n, the supp			
	Customer	UPenn	LPHIA CATER	ING COMPANY	Remit To Address Remit To Address				1 1					· · · ·	
	Supplier Account No.				Remit To Location I	ist		~	assign	ed a pri	mary remi	t-to addres	s in the	ir supplier	
							125 S 40TH STREE PHILADELPHIA, PA	10104	nrofile	and th	ere is no n	eed to ente	er anv fi	irther	
	Order Info							19104	1.1						
	Sales Order Number PO Number	1721740	TEST-DEV1-0	2002018			United States					supplier ne			
		5556525		2002010					prima	ry remit	tance add	ress for this	s specifi	c invoice.	
			Payr	nent Terms			1			Tax, S	Shipping & Handli	ng		?	
	Due Date			/22/2018			Discount	0	.00			-			
	Payment Terms			0 % ~	0 30		Tax 1		.00	_					
Menu Search				iscount	Days Net		Tax 2		.00	_					
(Alt+M)	Discount Date Estimated Discount Amount			/20/2018 .00 USD			Shipping		.00						
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															_
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Invoice Line	PO No.	Order Line	Part No.	Description		Product Size	Quantity	Unit	Price	Packaging	Extended Price	Tax, Shipping &	Handling		
1	3936923-TEST-DEV1-02092018	1	1	Quote: 85291; Catering for	PMI Speaker Matthias		136.0000	1.00		1/USD	136.00	show		Actions 👻 🔲	
				Rief lunch with grad stude	nts 1/8/2018 at		130.0000	•							
				12:00pm in 600 CRB			4								
													Subtotal	136.00	
													Tax 1	0.00	
													Tax 2	0.00	
													Shipping	0.00	
													Handling	0.00	
													TOTAL	126.00 1160	
L											_		TOTAL Need Hel	136.00 USD	

## Submitting Invoices via CSV Upload

- There is an option to submit a CSV-file upload with multiple invoices through the Jaggaer supplier network page screen.
- Once the supplier has been set up for this submission type to do CSV uploads, you can enter the Jaggaer Supplier Portal by selecting the user's name in the upper right-hand corner and clicking on "Return to Jaggaer Supplier Network" option.

📅 Home	PENN MARKETPLACE		Renee Smith 🔻 📕 🌢
Documents	Vour Procure-to-Pay Portal	) GRIL	Rence Return to JAGGAER Supplier Network
Reporting	Welcome to the Penn Marketplace Supplier Portal! Supplier Registration is required for new suppliers and a perenguisite for doing business with the	Quick Links to Common Tasks 7 Manage Registration Profile	Return to JAGGAER Supplier Network Logout
	University of Pennsylvania, but should not be interpreted as a method of becoming a preferred supplier. Suppliers that were previously registered with the	Create Invoice / Credit Memo 7	
	University but could be inactive in our system due to lack of use (supplier information is end dated in our system if the supplier has not been used within 18 months) will need to register again and provide updated information.	Type   Type  Credit Memo Invoice No.	
	Registered Penn suppliers and payees may access the secure portal at any time to maintain payment information, update contatic, insurance and tax information. Companies/Individuals may use the portal to access and neview purchase orders, generate and submit electronic invoices and check on payment status.	Invoice Date 02/20/2018 III mm/dd/yyyy Supplier ZESTO P/2ZA AND GRUL V	
	When viewing your invoices in the portal, you will see a status next to each of them. Below is an explanation of each of the statuses you might see:	PO Number Optional PO Number Currency US Dollar  Cares	
	In Process - The invoice has not been processed, but has been created.     Payable - The invoice has been processed and marked as Payable (OK to pay)     Paid - the invoice has been processed and	Find Invoice 1	
	marked as paid. • <b>Cancelled</b> - the invoice was canceled. Suppliers can either submit their invoices via the portal or can email them to appoint/@ upenn.edu with the following provisions:	Advanced Search To check payment status of an invoice or send a message to a sustomer regarding an invoice, please enter the invoice number then click the "Seach" button. Invoice Number(t)	
Menu Search	<ul> <li>Include the PO number on each invoice</li> <li>Provide one (pdf only) file per invoice (= of files per email is unlimited)</li> <li>All PO invoices to Penn will be sent via email only</li> </ul>	Search	

- From the Jaggaer Supplier Network homepage, locate the "Create Invoice" widget and select the customer to "University of Pennsylvania" and click on "Import Invoice."
- Additional training materials or help resources, can be found in Jaggaer's **Training & Support** library by clicking on the link in the lower right-hand corner.

n Home	J/\G	6ヘ手			Renee Smith * *	Alt+Q     Alt+Q     C     C
🗐 Documents	🙀 Home 🗦 Supplier Portal Home 🗢	> JAGGAER Supplier Network Hor	iê			Did you know?
Suppliers	ZESTO PIZZA AND G JAGGAER Network ID Manage Customer Registratic	1000	Change Suppl	ier View 🔻   ?	Address your accession of the contraction of the co	What the D icon means? Whenever you see this icon on the page, specific training is available for that section.
Administer	Create Invoice / Cred	Invoice Credit Memo	Ing	port Invoice 2	Are you prepared for JAGGAER Security Upgrade to TLS 1.1/1.2 ? • UIT: April 14, 2018 at 8:00 pm EST • Production: May 12, 2018 at 8:00 pm EST	Click on the icon to learn more. Don't show me this again
	Invoice No.	02/20/2018 ()) mm/dd/yyyy University of Pennsylvania Optional PO Number US Dollar V	· · · · · · · · · · · · · · · · · · ·	-	Find Invoice 2 Advanced Seach To check payment status of an invoice or send a message to a customer regularing an invoice, please enter the invoice number then click the "Search" bottom. Invoice Number(s) Cauch	
	Customer Portal Acco	ess Registration Status	Customer Contact	Create	Need Assistance?     ?       Help	
에 Menu Search (Alt+M)	University of Pennsylvania	Complete	Procurement Services Operations Cen View All	ter Registrations	Iraining Conter Training and Support Supplier Contact Name: Vira Homick Tale: Email: homicks@uppen.edu Phome: =1253B00182	

- Once "Import Invoice" is selected, select "Import" from the drop-down menu on the Request>Action box, add a description, and then upload the CSV file. The supplier also has the option to download the CSV Template and look at the Sales Invoice Sample Import File for guidance.
- Once uploaded, the supplier can click "Submit" to submit the file to Penn.

n Home	لمركحة المحاط		Rence Smith * # A Sea	rch (Alt+Q) Q
Documents	Documents > Sales Invoices > Import Invoices ~			7 8
Suppliers	Request	2	Recent Activity	Refresh this Page 2
🔀 Tools	Select the appropriate option from the Action drop Template link. Action Description	down and enter the required information. For a CSV input file template, click the Sales Invoice CSV	To see the latest status of the last five (5) requests submitted, click Refresh. If the submitted request is not visible, submitted requests by clicking the "Click here for additional requests" (ink. To view the output file for a complete the file name or the "Click to download" (ink so the file can be viewed or saved.	
			No matching records found.	
	File Name	expand clear  Submit	Click here for additional requests	
	Click the Adobe icon for import instructions	a		
	Sales Invoice CSV Template Sales Invoice Sample Import File	Click to download Click to download		
06 Menu Search (Alt+4)				

## Searching Sales Invoices and Payment Statuses

- Select "Documents" >"Sales Invoices" > "Search for Sales Invoices" on left-hand navigation path
- Invoice status definition is listed on the homepage.

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Reporting	Document Search Sales Invoices Sales Orders and S	1
Registration	Sales Invoices Search for Sales Invoices	
	Interpreted as a method of becoming a preserved supplier. Suppliers that were previously registered with the University but could be inactive in our system due to lack of usis upplier information is and dated in our month) will need to register again and provide updated information. Registered Pann suppliers and pyres may access the secure portal as any time to mantain payment information. Companies Infoldulas may use the generate and submit electronic Invoices and check on payment status.	Create Invoice / Credit Memo         z           Type         Invoice O Credit Memo           Invoice No.
o⊛ Menu Search (At+M)	explanation of each of the statutes you might see • In Process - The invoice has not been processed, but has been created. • Payable - The invoice has been processed and marked as Payable (Not pay) • Paid - the invoice has been processed and marked as paid. • Cancelled - the invoice was canceled. Suppliers can either submit their invoices via the portal or can email them to appoint(b) upenedu with the following provisions: • Include the PO number on each invoice • Invoice to Penn will be sent via email only	Currency US Dollar Currency Cu

• Select search criteria for sales invoices.

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- Registration	Search Details ?	Invoice Number	Curtomer	Created By	Sales Order No	PO No	Invoice Date	Submit Date	Туре	Invoice Status	Total
	Search Terms	P016		Renee Smith	1721491	3936400-TEST-DEV1-02092018		2/14/2018 12:52 PM	Invoice	Status: Payable	50.00 USD
	Customer(s)								J	Paid Date: Payment Method: Check	
	Filtered by	TESTINVI 🖻	UPenn	Renee Smith	1721609	3936781-TEST-DEV1-02092018	2/13/2018	2/13/2018 8:19 AM	Invoice	Status: In Process Paid Date: Payment Method: Check	129.70 USD
	Date Type: Sales Invoice Date Date Range: All Dates [remove all]		UPenn	Renee Smith	1721609	3936781-TEST-DEV1-02092018	2/13/2018	2/13/2018 8:11 AM	Invoice	Status: In Process Paid Date: Payment Method: Check	259.40 USD
	Supplier	TESTZESSAW	UPenn	Renee Smith	1721594	3936673-TEST-DEV1-02092018	2/13/2018	2/13/2018 2:20 PM	Invoice	Status: Payable Paid Date: Payment Method: Check	5.00 USD
	Refine Search Results	CREDITTEST 🖻	UPenn	Renee Smith	1721786	3937036-TEST-DEV1-02092018	2/13/2018	2/13/2018 8:17 AM	Credit Memo	Status: Payable Paid Date: Payment Method: Check	-100.00 USD
	Date Range	TESTINGCREDIT	UPenn I	Renee Smith	1721609	3936781-TEST-DEV1-02092018	2/13/2018	2/13/2018 8:14 AM	Credit Memo	Status: In Process Paid Date: Payment Method: Check	-129.70 USD
	Sales Invoice Invoiced by	SAW123 🕰	UPenn	Renee Smith	1721594	3936673-TEST-DEV1-02092018	2/13/2018	2/13/2018 9:54 AM	Invoice	Status: Payable Paid Date: Payment Method: Check	20.00 USD
	Renee Smith (18) Brian Caputo (14) Vira Homick (1)	TESTZESTOPIZZA1	UPenn	Renee Smith	1721786	3937036-TEST-DEV1-02092018	2/13/2018	2/13/2018 8:08 AM	Invoice	Status: Payable Paid Date: Payment Method: Check	292.30 USD

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## Other Training Resources

To access additional tutorials and training, click on "Supplier Name," then click on "**Return to** Jaggaer Supplier Network" to gain access to video training material covering many supplierrelated activities including Supplier Registration and Creation of an Invoice from a Sales Order (PO-Flip process).

Tools > Online Training and Support > View Online Training	g and Support > Online Training and Support	
Getting Started - Introductory information for the JAGGAER Supplier Network         Registration and Profile Management - Introductory information around registering for the JAGGAER Supplier Network and maintaining your profile.         What's New in this Release? - Summary of changes from the most recent product release.         Product Release Information - Learn about	Invoicing 101 - Learn about the invoicing and communications functionality in the JAGGAER Supplier Network. JAGGAER Supplier Network Handbook - Learn about sourcing, e-auctions, invoicing, 2nd Tier Reporting, and supplier scorecards. Training Videos • Reporting 2nd Tier Spend	Supplier Catalog Management Handbook - Find detailed information regarding uploading and maintaining product and price information for your customers.         Hosted Content Impacts on Product Search - See how your hosted content translates into a customer's product search.         Product Search at a Glance - See how customers view your products in their application.
upcoming product changes and important dates. Training Videos	Completing a Questionnaire for a Customer     Responding to a Sourcing Event     Creating an Invoice from a Sales Order     Manading Invoices	Training Videos  • Preparing the Content and Price Files
The JAGGAER Supplier Network Overview     The Shopping Experience	Importing Invoices in Bulk	Submitting Content and Price Files     Assigning Categories and UNSPSC Codes     Extracting Content and Price Files
Beginning the Supplier Network	Reference Materials	Working with Content and Price Files in Exce
Registration     Completing a Customer-Specifit     Registration     Navigating the Supplier Portal	<ul> <li>Sales Invoice Import Guide</li> <li>Sales Invoice CSV Template</li> <li>Sales Invoice Sample Import File</li> </ul>	Reference Materials

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