

GETTING STARTED WITH PENN MARKETPLACE

Last updated April 23, 2018

This guide outlines initial steps to enhance your experience with the navigation and execution of processes in the Penn Marketplace.

System Access - Logon

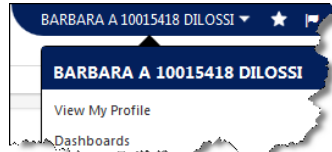
- Navigate to the Penn Purchasing Services website:
<https://cms.business-services.upenn.edu/purchasing/>
- Click **Enter Penn Marketplace**
- Click on **Log in to the Penn Marketplace**
- Enter your PennKey and Password
 - For **BEN Financials**, go to <https://benapps.isc-seo.upenn.edu/>. Click on **BEN Financials**. Logon using your **BEN Financial User Name and Password**. Click on **Requisitioner>Requisitioner Home Page**. Click on **Shop at Penn Marketplace**.

Editing Your Profile

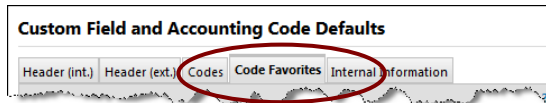
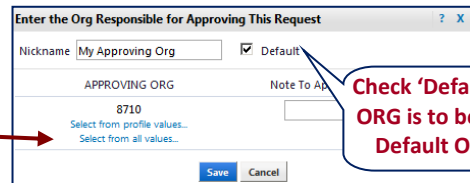
Default Approving Org

A default Approving Org has been preloaded. To change the Default Approving Org:

- Select **View My Profile** from the drop-down menu under your name.
- Click **Default User Settings** ▾ menu on the left of the window and select the **Custom Field and Accounting Code Defaults** option.



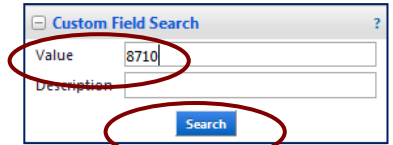
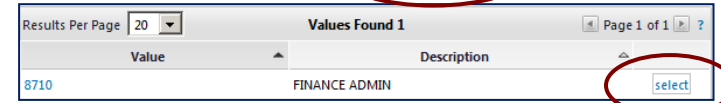
- Click **Code Favorites** tab.
- Click **[Add]** just above the **Enter the Org Responsible for Approving This Request**.
- Enter a **Nickname** for the Approving ORG.
- Click **Select from all values...** link.

Check 'Default' if ORG is to be the Default ORG

- Note:** Click on the **Select from profile values...** link if you have multiple org numbers in your profile and are switching defaults.

- Enter desired Approving Org number in the **Values** field.
- Click on **[Search]**.
- Click **[select]** for the desired ORG.
- Click **[Save]**.

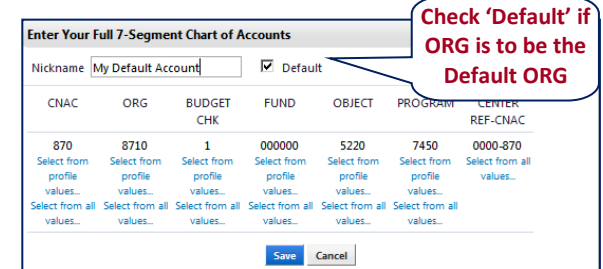



Value	Description
8710	FINANCE ADMIN

Default Accounting Code

A Default Accounting Code has been preloaded. To change this Code:

- Follow the previous steps for Default Approving Org up to Step #3.
- Click **[Add]** just above the **Enter Your Full 7-Segment Chart of Accounts**.
- Enter a **Nickname** for the Accounting Code.
- Click on the **Select from all values...** link.
- For each segment, enter value desired in the **Values** field.
- Click on **[Search]**.
- Click **[select]** for the desired value.
- Click **[Save]**.

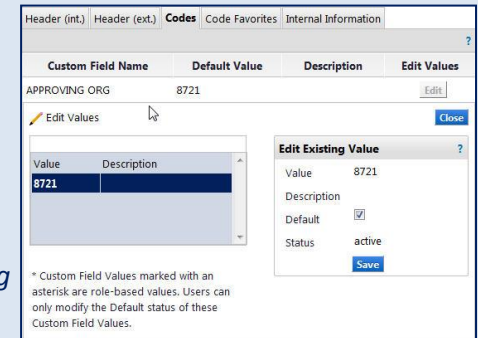


Check 'Default' if ORG is to be the Default ORG

CNAC	ORG	BUDGET CHK	FUND	OBJECT	PROGRAM	CENTER REF-CNAC
870	8710	1	000000	5220	7450	0000-870

For 'Go Live' Preparers and Approver Only

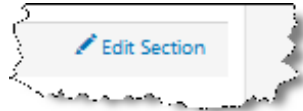
Your Default Accounting Codes were uploaded in the 'Codes' tab, i.e. not the 'Code Favorites' tab. Therefore, when updating the default Approving Org and/or Accounting Code in the Code Favorites tab, you should also update/remove the corresponding default on the Codes tab.



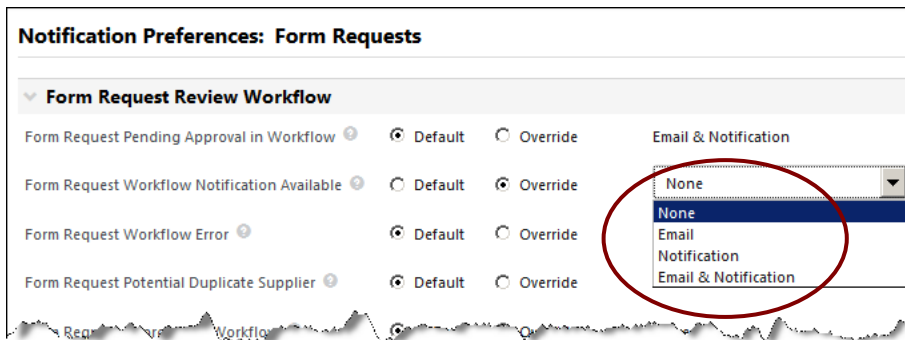
Notification Settings

A default notification setting has been preloaded for both New Supplier and Non-PO Payment Requests. To review or make changes to notification settings relating to these two items:

- Select the *View My Profile* option from the drop-down menu under your login name.
- Click **Notification Preferences** ▼ menu on the left of the window and select *Accounts Payable, Supplier Management and/or Forms Requests*
 - The ⓘ icon explains each type of notification.
- To make a change, click **Edit Section** link.
- Click on the **Override** for a desired setting change.



🔗 *Note: A drop-down box is now available with varying options.*



- Select your desired option from the setting's drop-down menu.
- Click **[Save Changes]**.

Recommended Notification Settings

- Accounts Payable: Invoice Rejected, Invoice Returned
- Supplier Management: All
- Form Requests: Form Request Pending Approval in Workflow, Form Request Rejected in Workflow, and Form Request Completed in Workflow

Additional Questions? Please Contact Us

Penn users may contact **BEN HELPS (215.746.4357)** or enter a ticket with BEN HELPS (<http://BENHelps.finance.upenn.edu>). Supplier support is available at **215.898.7216** or

SupplierSupport@upenn.edu.

If you have non-operational questions or feedback about the Penn Marketplace, contact PennMarketplace@upenn.edu.

Setting Favorites

Defining Favorites in Penn Marketplace shortens the data entry required by saving recurring Accounting Codes and entire Non-PO Payment Requests.

Favorite Accounting Codes

Favorite accounting codes are created similar to setting a default Account Code. The exception is, for a non-default favorite, the **Default** checkbox remains unchecked. See *Default Accounting Code* above for more detail.

When creating a Non-PO Payment Request, on the *Codes* screen, you have the option to click on the **[Edit]** to change the Accounting Code. Your favorite Accounting Codes are listed by **Nickname** in the **Select from your code favorite** drop-down menu.

Favorite Non-PO Payment Request

To save a 'favorite' Non-PO Payment Request template for future use:

- Create a new Non-PO Payment Request or access an existing Request.
- Populate as much of the Non-PO Payment Request you want to include.

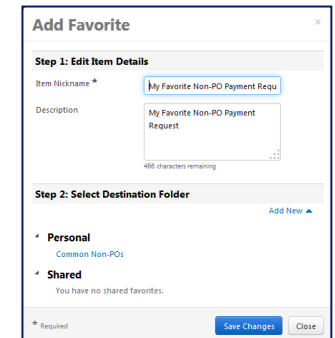
🔗 *You may choose to remove prior attachments or alter the COA as needed*

- On the *Review and Submit* screen, click **[Add to Favorites]**.

- In the *Add Favorite* dialog box, enter an **Item Nickname**.

🔗 *A more detailed description in Description field may also be used.*

- Select a **Destination Folder**.
- Click **[Save Changes]**.



To Use a Favorite Non-PO Payment Request:

- Click **Favorites** under *Shortcuts* on the Penn Marketplace dashboard.
- Locate your favorite in the Destination Folder and click on the nickname link.
 - A copy of the saved Non-PO Payment Request will be accessed.
- Edit the request as needed for the current transaction; click **[Submit]**.



Reference Materials

For training information, QRGs, FAQs, etc. visit <https://cms.business-services.upenn.edu/purchasing/making-purchases/marketplace-enhancements/training.html>