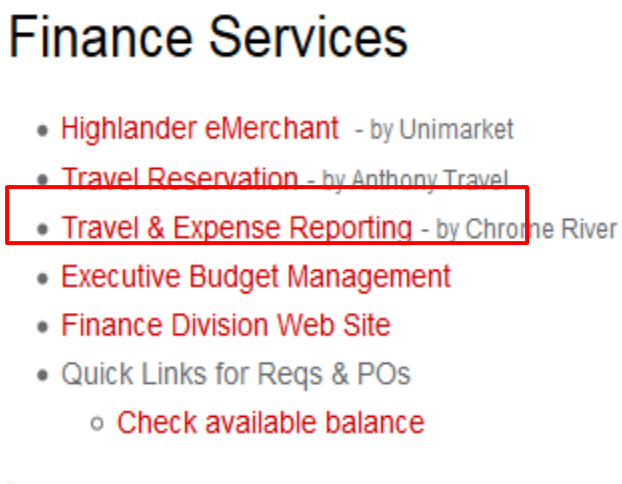
Highlander eMerchant: Procure2Pay System

Highlander eMerchant

- P2P system
- Fully rolled out by the first week in April, 2019
- Single Sign on through My NJIT



Purchasing Definitions

- **P2P**: Short terminology for "Procure to Pay“
- **Purchase Order**: A legally binding document prepared by a purchaser to the supplier
- **Quick Orde**r: Orders that go straight to the supplier without approvals up to $1,000.
- **Required Fields**: Any field marked with a red asterisk is a required field (*)
- **Catalogs**: There are two types of catalog~~ue~~s: Roundtrip/ Punch-out and Hosted catalog~~ue~~s.
- **Buyer:** An individual with Fiduciary Responsibility that can shop, check out; and may also be an approver.
- **Browser:** An individual that can shop for items and place them in a cart, but cannot “check out” to place the order. They will need to “reassign” the cart to the Buyer within their area.
- **Approver:** An individual with Fiduciary Responsibility.

Purchasing Definitions Continued…

- **Invoice**: A bill for goods or services purchased that includes pertinent information with respect to the quantity, price, terms and nature of delivery.
- **Vendors**: A vendor is referred to as a "supplier" in ***Highlander eMerchant.***
- **cXML Invoice**: cXML is the integration language that is used between ***Highlander eMerchant*** and suppliers. A cXML invoice is created by the supplier's system, and automatically sent through to ***Highlander eMerchant.***
- **Help Bubble**: Any time you see a blue question mark, a help bubble will appear when you hover your cursor over it to provide helpful information about the field or section of the site.

Types of shopping experiences in Highlander eMerchant

There are four methods for ordering Products and/or Services

- **Roundtrip/Punch-out**: supplier products are found on the suppliers' ecommerce website with a direct link to and from Highlander eMerchant. Roundtrip/Punch-out functionality will be identified with the icon . A ne ndow or tab will open in your internet browser and you will be signed into the NJIT account on the supplier's ecommerce site.
- **Hosted Catalogs**: supplier products are "hosted" on the Highlander eMerchant portal, meaning you do not leave the Highlander eMerchant portal to search and order these products. Hosted Catalogs are identified with the folder icon.
- **Non-Catalog Items**: products requiring information to be entered manually. Some Catalog Suppliers could have products that can be entered manually if a product is not found in any of their catalogs or comes up as a restricted item.
- **Blanket Orders**: Similar to a Standing Order, method of encumbering the funds for purchasing services such as Consulting Agreements, Maintenance Contracts. They cannot be used for any of the catalog suppliers.

Types of suppliers in Highlander eMerchant

Suppliers: There are two types of suppliers found in ***Highlander eMerchant***:

- **Registered**: A supplier that has self-registered in the portal and maintains it's own information. This would include uploading their required documents such as BRC, COI etc… A registered supplier can also participate in quotes and sourcing events. Once the vendor is registered they become a supplier in the Highlander eMerchant portal.

- **Lite**: A supplier that does not want to register. In this instance the Office of Procurement Services would need to enter the information into the Highlander eMerchant portal. A lite supplier cannot participate in request for quote (RFQ) and documentation needs to be stored manually

General Purchasing Guidelines

Expenses <15% of NJIT's Bid Limit (currently $28,200)

- W-9 or W-8 (foreign)

Expenses > 15% of NJIT's bid Limit but less than $28,200

- W-9 or W-8 (foreign)
- BRC – **B**usiness **R**egistration **C**ertificate

Expenses > $28,200 up to $75,000

- W-9 or W-8 (foreign)
- BRC
- Affirmative Action Paperwork
- Bid
- Sole Source
- State Contract

Expenses > $75,000 but < $1,000,000

- W-9 or W-8 (foreign)
- BRC
- Affirmative Action Paperwork
- Bid
- Sole Source
- State Contract
- Presidential Approval

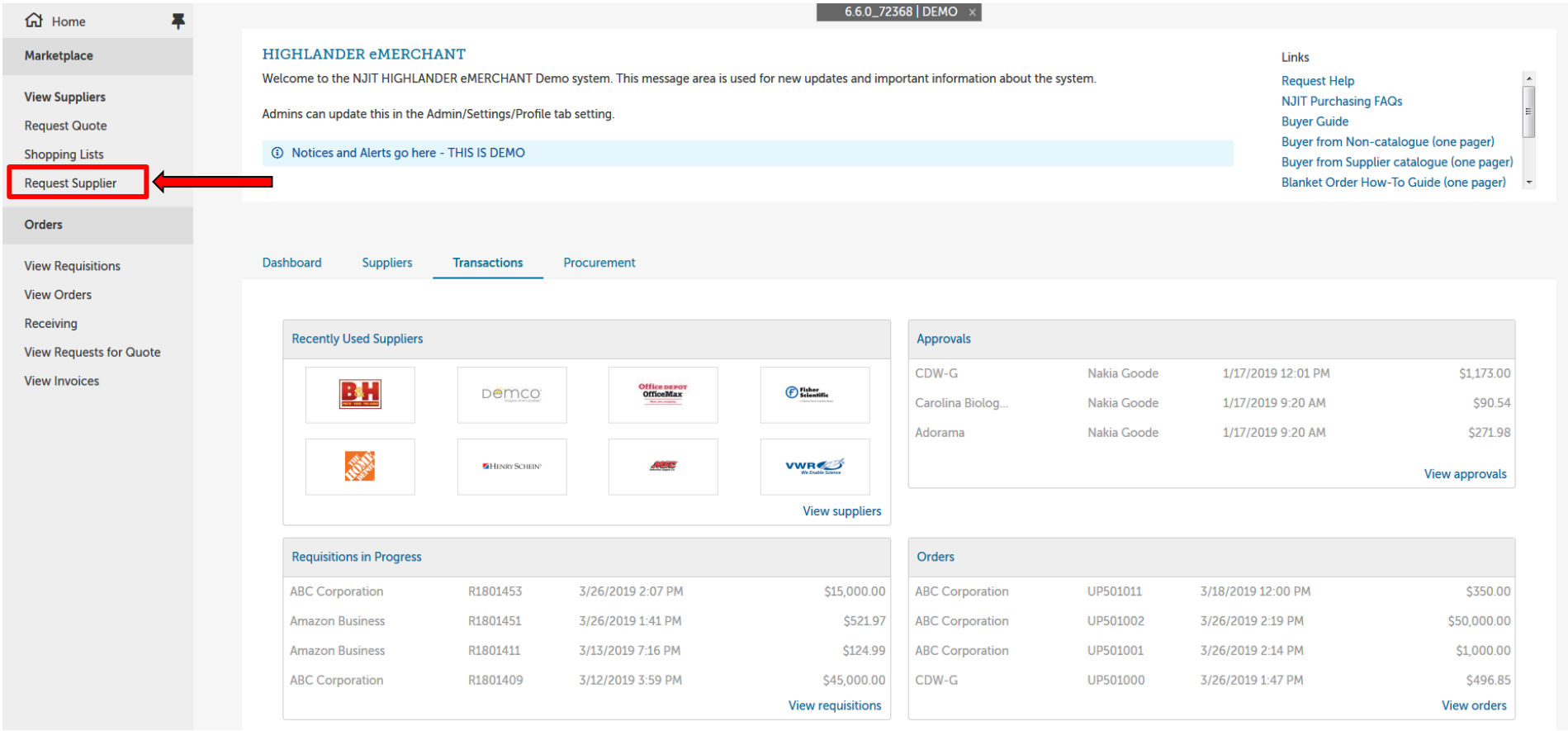
Expenses > $1,000,000

- Board of Trustees Approval
- W-9 or W-8 (foreign)
- BRC
- Affirmative Action Paperwork
- Bid
- Sole Source
- State Contract
- Presidential Approval

- **OTHER:**
- Certificate of Insurance
- Cannot mix fixed and non-fixed assets on one requisition – will be denied

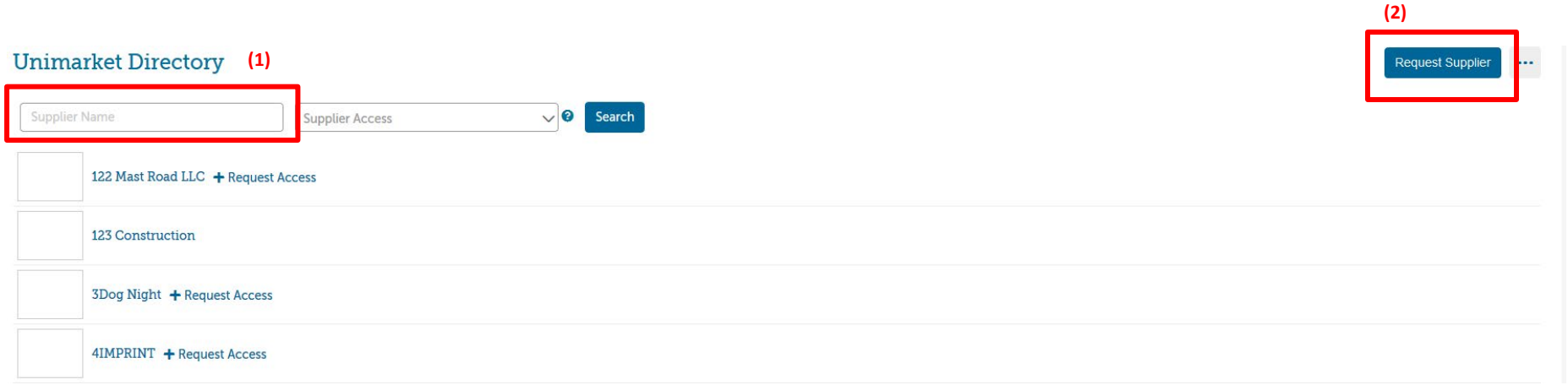
NOTE: *If a supplier is registered they do not need to upload a w-9 or W-8 as the portal has a self-certification that is accepted by the IRS.*

Requesting a New Supplier



- Click on **Request Supplier** within the Marketplace on the homepage to request a new supplier

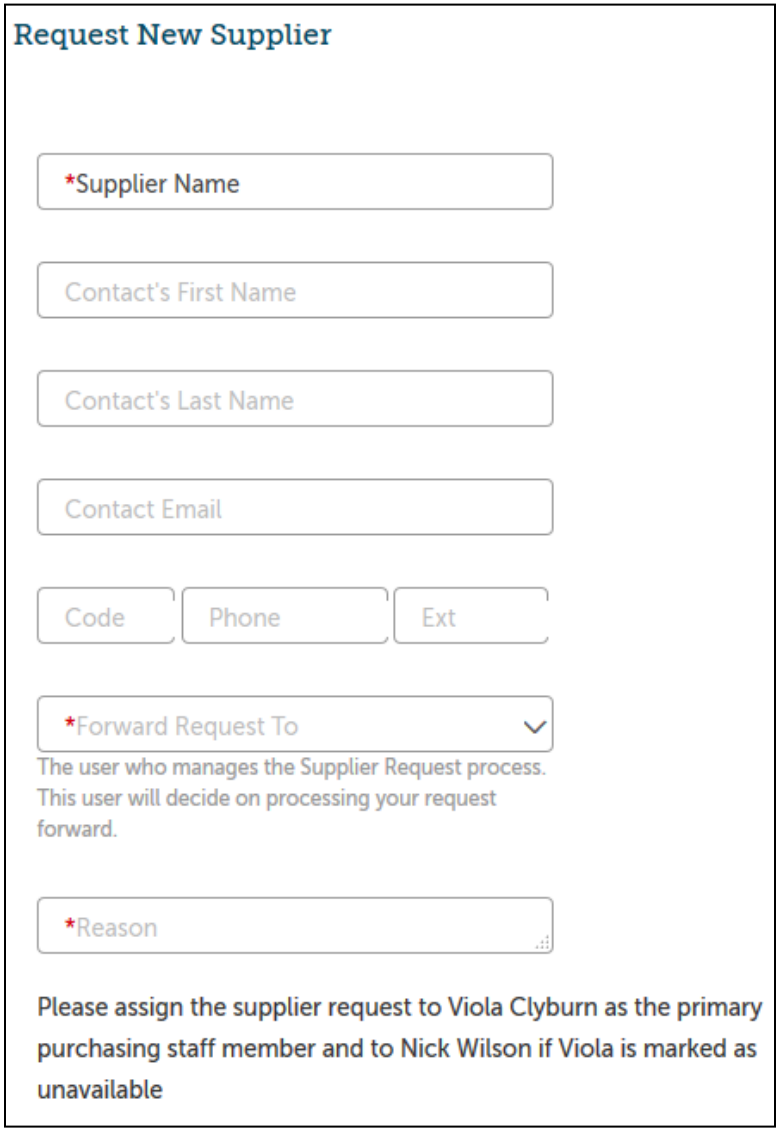
Requesting a New Supplier



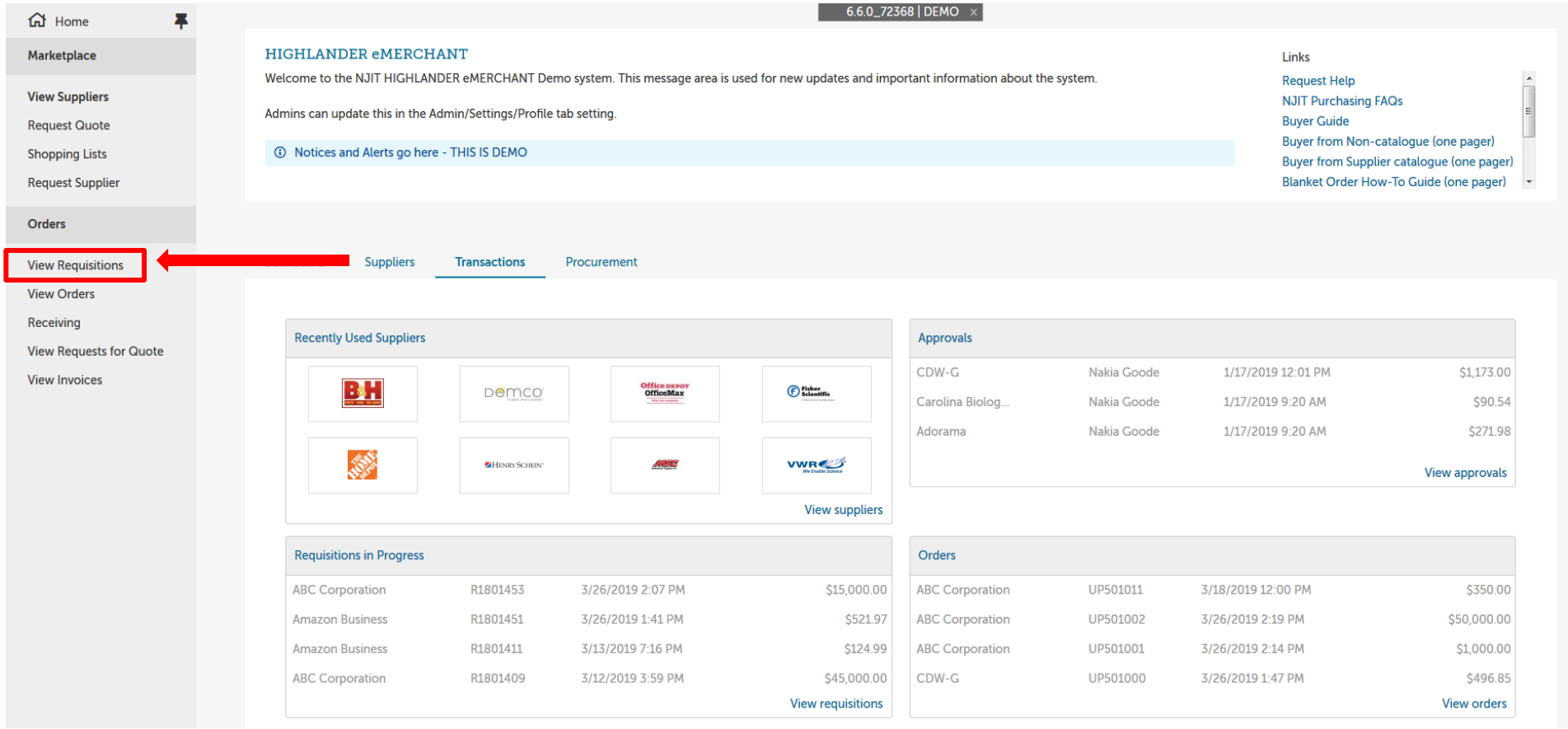
1. First search within the Unimarket Directory to see if the supplier you are looking for is available in the system.
    - This is a quicker way of getting a supplier connected into the Highlander eMerchant system
2. If the Supplier you are looking for is not available within the Unimarket Directory, you then will need to click the **Request Supplier** button on the top right hand of the page where a form will open up requesting information about the supplier you are looking to connect.

Requesting a New Supplier

- Once you have clicked the **Request Supplier** button a form will open up where you will be asked to provide information
- Once this form has been filled out it will route to the Procurement Support Specialist that you selected. The Procurement Support Specialist will work with the supplier on getting connected into the system.



View Requisitions



- Click on **View Requisitions** within the Marketplace on the homepage to view your requisitions.

View Requisitions

Requisitions

Search by Req. #

Search by supplier

Search by timeframe

Requisition Number

Supplier

Period
Last 90 Days

Search

Requisition	Buyer	Supplier	Type	State	Approvers	Created	Total
R1801454	Chelsea Laday	ABC Corporation	Retrofit	No approval needed		3/26/2019 3:04 PM	$350.00
R1801453	Andrea Doren	ABC Corporation	Blanket	Pending	John Gruppo, Lisa Easton	3/26/2019 2:07 PM	$15,000.00
R1801452	Chelsea Laday	CDW-G	Standard	Approved		3/26/2019 1:47 PM	$496.85
R1801451	Chelsea Laday	Amazon Business	Standard	Pending	John Gruppo, Lisa Easton	3/26/2019 1:41 PM	$521.97
R1801422	Chelsea Laday	ABC Corporation	Retrofit	No approval needed		3/14/2019 2:54 PM	$105.00
R1801421	Chelsea Laday	ABC Corporation	Retrofit	No approval needed		3/14/2019 2:45 PM	$55.00
R1801413	Chelsea Laday	ABC Corporation	Blanket	Canceled	John Gruppo, Lisa Easton	3/13/2019 7:38 PM	$0.00
R1801412	Chelsea Laday	B & H Photo Video (cXML orders)	Standard	Approved		3/13/2019 7:20 PM	$124.37
R1801411	Chelsea Laday	Amazon Business	Standard	Pending	John Gruppo, Lisa Easton	3/13/2019 7:16 PM	$124.99
R1801409	Chelsea Laday	ABC Corporation	Blanket	Pending	John Gruppo, Lisa Easton	3/12/2019 3:59 PM	$45,000.00
R1801408	Chelsea Laday	B & H Photo Video (cXML orders)	Standard	Approved		3/12/2019 3:50 PM	$646.92
R1801407	Chelsea Laday	Amazon Business	Standard	Pending	John Gruppo, Lisa Easton	3/12/2019 3:47 PM	$799.95
R1801406	Chelsea Laday	ABC Corporation	Blanket	Pending	John Gruppo, Lisa Easton	3/8/2019 10:48 AM	$25,000.00

- Search for **Requisitions** by a requisition number, by supplier or by a specific timeframe.

Budget Checking

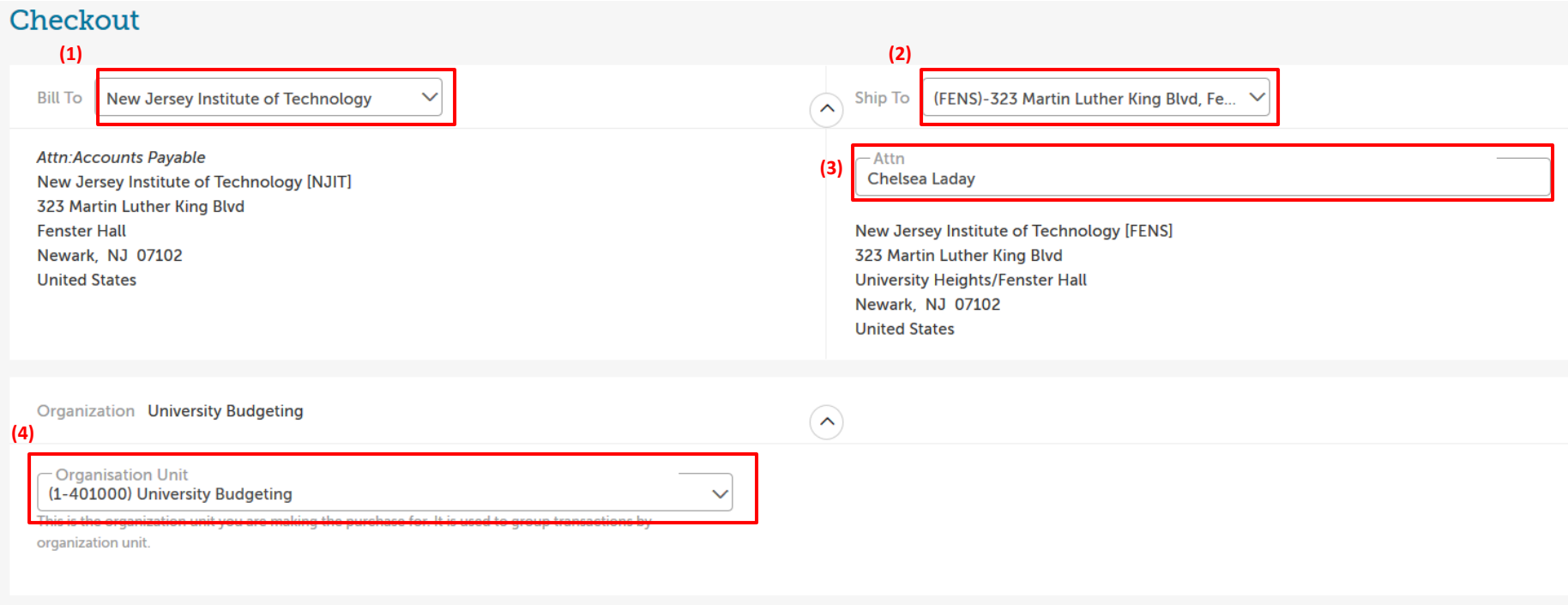
- Within Highlander eMerchant, there is budget checking throughout the whole purchasing process. The system will notify the user if there is insufficient funding.

- If you are notified of insufficient funding, please contact your business office manager/ approved user for budget transfers or your budget analyst in the budget department to request a budget transfer.

- Helpful Hint – To check your budget, please use Budget Availability Query in SSB (Self-Service Banner).

- Please Note: Requisitions in approvals DO NOT show as pending documents. You will need to account for these when reviewing your budget. On occasion documents may post simultaneously this can create an out of balance and creates an interface error. You will be contacted when this occurs.

Requisition Checkout – Delivery Info



1. **Bill To**: Select the appropriate chart of accounts to create the purchase order under.
   - Be mindful if you are purchasing for NJIT (Chart 1 or 2)
2. **Ship To**: Select the building code where you would like the package shipped to. Use the same building coding that was used in banner.
3. **Attention:** Enter the Room Number followed by the last name of the person receiving the items.
4. **Organization Unit**: This is based on the security and allows others within the same organization to view the order. Always use 6-digit Org number.

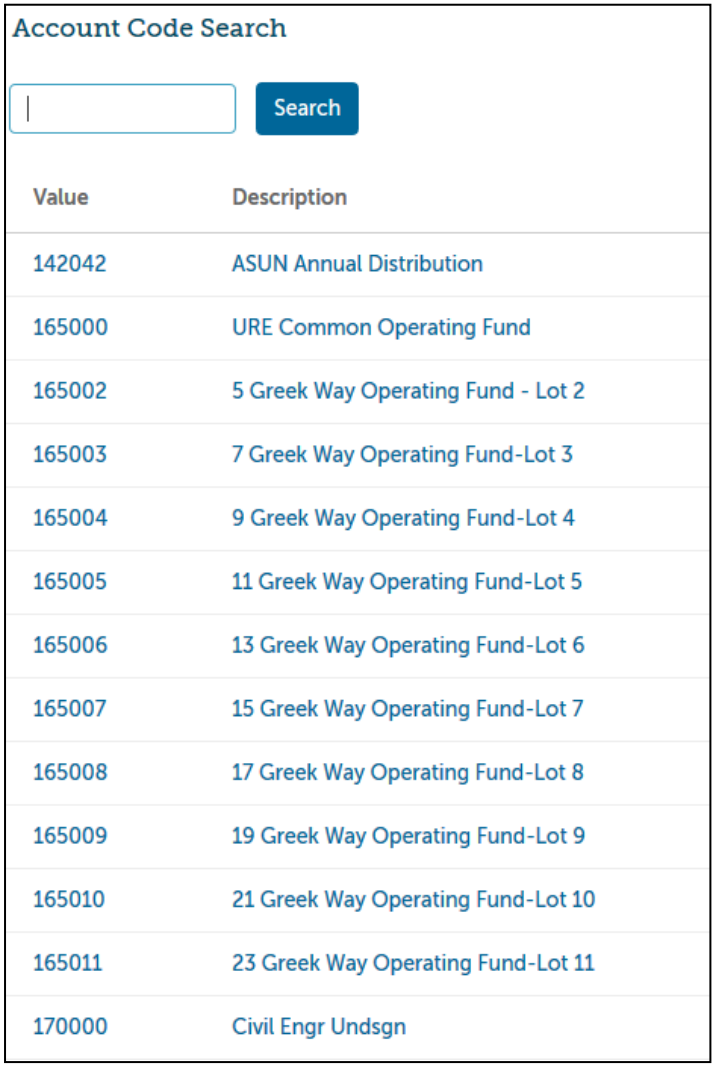
Requisition Checkout – Account Code Lookup

Use the following steps to fill in Account Fields

1. Within the account string, when you click on each field a magnifying glass will appear that when clicked will open a search screen that will allow you to search based on the account code or description
2. Fields that will need to be filled in by the user are the Chart of accounts, index, and account code
3. All other fields (Fund, Org & Program) will auto fill based on the index and account selected

NOTE: Buyers and approvers have **fiduciary responsibility** on correct index/account code usage

Magnify Glass Search screen

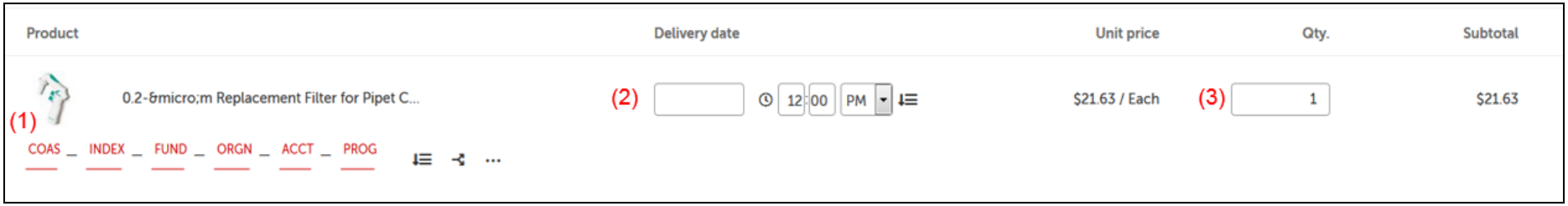


Account Code Search

Search

Value	Description
142042	ASUN Annual Distribution
165000	URE Common Operating Fund
165002	5 Greek Way Operating Fund - Lot 2
165003	7 Greek Way Operating Fund-Lot 3
165004	9 Greek Way Operating Fund-Lot 4
165005	11 Greek Way Operating Fund-Lot 5
165006	13 Greek Way Operating Fund-Lot 6
165007	15 Greek Way Operating Fund-Lot 7
165008	17 Greek Way Operating Fund-Lot 8
165009	19 Greek Way Operating Fund-Lot 9
165010	21 Greek Way Operating Fund-Lot 10
165011	23 Greek Way Operating Fund-Lot 11
170000	Civil Engr Undsgn

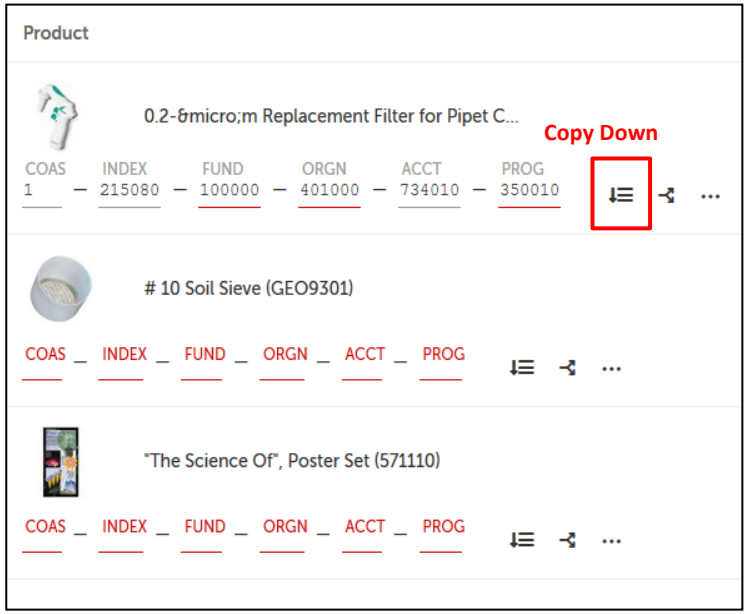
Requisition Checkout - Accounting Information

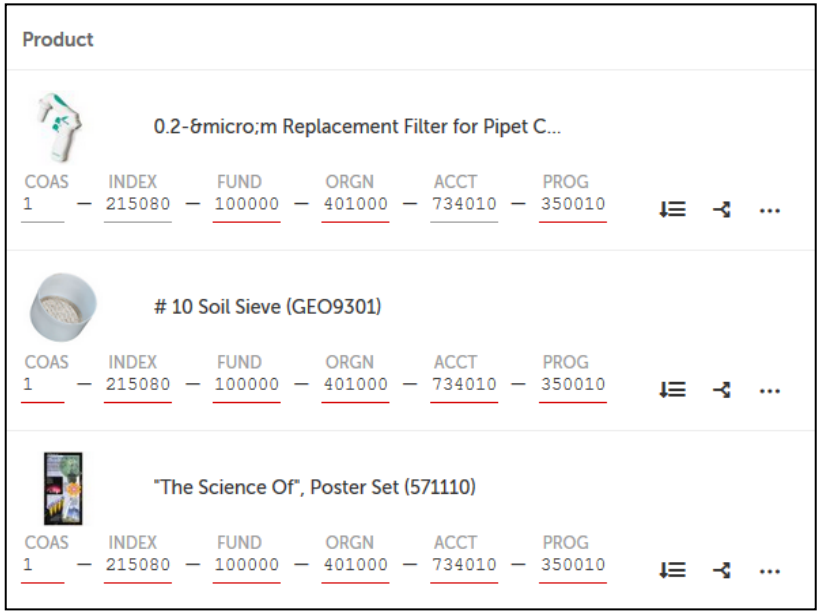


Use the following steps to fill in the above fields:

1. **<u>Accounting String</u>**: Enter the accounting information within each of the fields. Each field has search capabilities that can be utilized.
2. **<u>Deliver Date</u>**: Fill in the requested **Delivery Date** for when you would like your products to be delivered.
3. **<u>Quantity</u>**: Fill in the quantity of how many you would like to order. Please note that when you adjust the **Quantity** the **Subtotal** to the right will adjust based on the **Quantity** and **Unit Price**.

Requisition Checkout - Accounting Distribution





1. There is no limit to the number of line items that can be within a requisition.
2. Each line item will need accounting information filled in.
3. If multiple line items are using the same accounting string, you have the ability to **Copy Down** the accounting string to other line items below.
   - Please note that if you use the copy down feature, it will override any information that was previously within the account strings below it and you will need to verify that the same account code applies to each item.

Requisition Checkout - Delivery Notes / Attachments

(1) Notes and Attachments sent to the Supplier

Delivery notes

Blanket order

Optionally create a release order selecting a blanket order to draw down from.

Order attachments

You can choose which order attachments will be sent to the supplier together with the order.

Drop files to attach, or browse

Size limit 50M.

Order receiving

Receive Manually

Justification Justification Instructions

The justification and attachments are for review by the approver. They will not be sent to the supplier.

(2) Notes and Attachments for internal use

Justification

Justification Type

Justification Instructions

Ensure that you have checked with Facilities for any available surplus

How to and when to complete a Sole Source for Services or Equipment

What is needed before a consulting requisition can be created or approved.

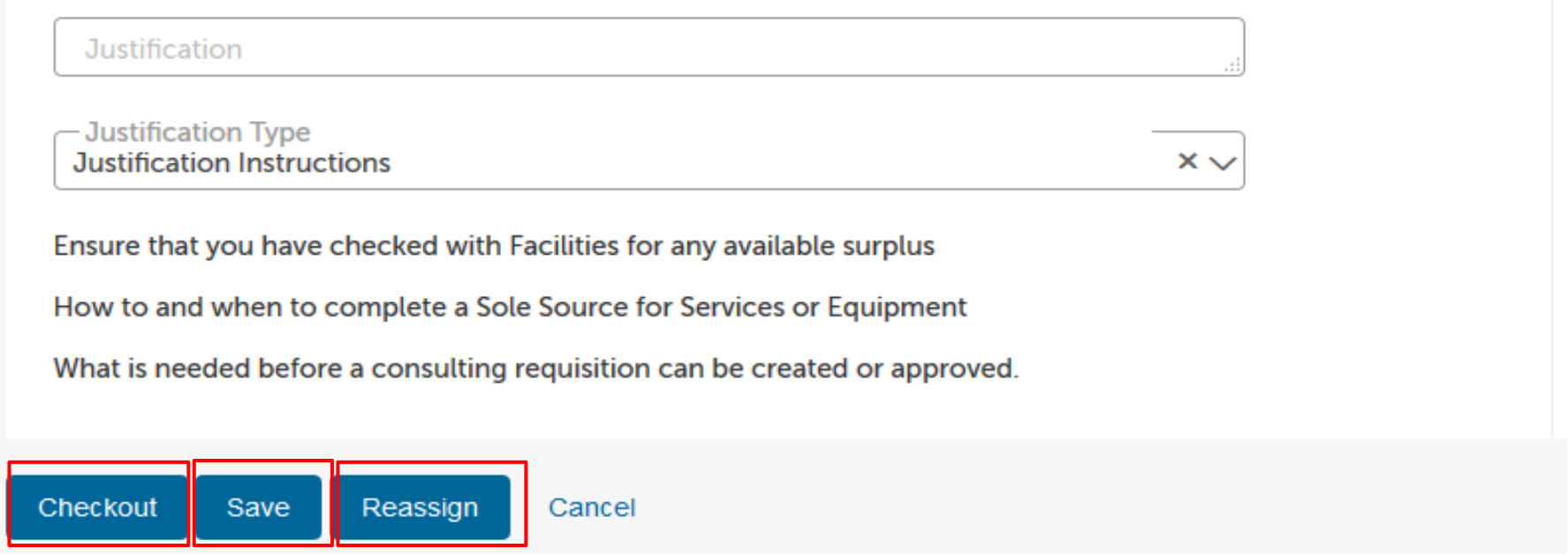
Justification Attachments

Drop files to attach, or browse

Size limit 50M.

1. All Notifications and/or attachments that need to be sent to the supplier must be placed in the **Delivery Notes and Attachments** section.
2. All Notifications and/or attachments that need to be routed internally as support for the approval of the requisition must be placed in the **Justification Notes and Attachments** section.
   - Examples of Justification types are Sole Source forms, Consulting/ Subcontracting contracts, Furniture quotes, etc.

Requisition Checkout



- If you are a **Browser** (see Glossary for detail) and need to reassign to a **Buyer**, here is where you can select the **Reassign** button to select the **Buyer** to reassign to for approval.
- Once you have reviewed all the information within the checkout screen, if you have **Buyer** capabilities, you then can click the **Checkout** button at the bottom of the screen on the left hand side.
- If you are unable to complete filling out the checkout screen and will need to complete at a later time, you have the ability to **Save** the requisition and complete later.
- Once you have selected **Checkout**, you have completed the process of creating a requisition and will either receive a Requisition Number or Purchase Order Number depending on if approvals are needed.

Requisition Approval Process

Approver	Created Date	Completed Date	Level
1-40100 Dept Appr			Up to $5K ($5,000.00)
John Gruppo			
Lisa Easton			
1-40100 Dept Head/Business Off Appr			Clearing Authority ($999,999,999.00)
John Gruppo			
Lisa Easton			

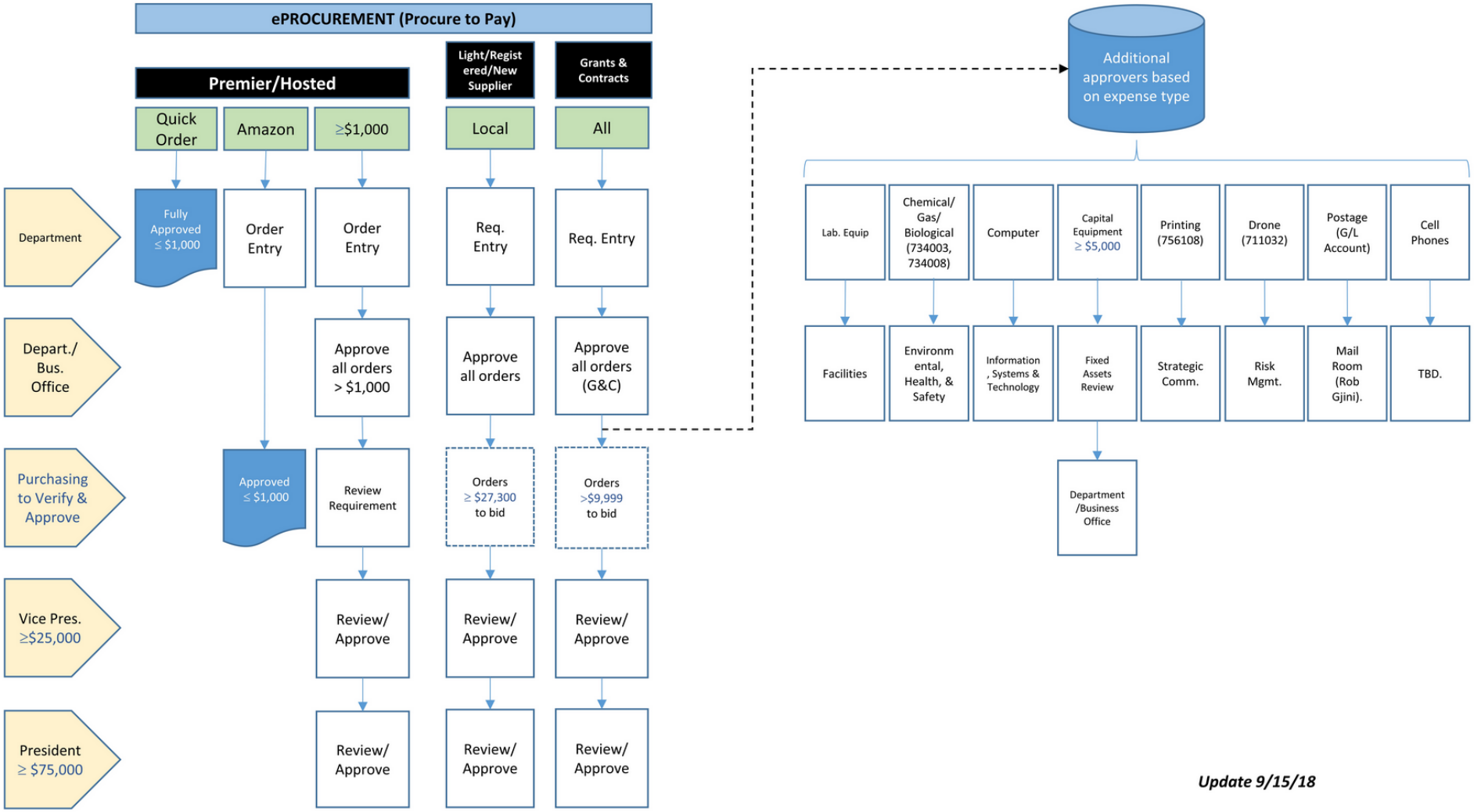
Special Approvals: Computer and technologies [1-215080-100000-401000-710010-350010]

Fixed Asset Approvals: Fixed Assets [1-215080-100000-401000-710010-350010]

Purchasing Approvals - Standard: Purchasing (Stan) [1-215080-100000-401000-710010-350010]

- Once you submit your requisition and approvals are required, you can click on the approval tab to see status.

How Do Approvals Work



Blanket Order - Checkout Details

Details

Name *

1.

Description

2.

Supplier *

3.

Amount *

4.

Valid From * 6/12/2018 12 : 00 AM

Valid To * 11 : 59 PM

5.

Default Account Code *

Split

Allow Release Order Coding

6.

Tax

Sensitive

Ship To *

Attn * Andrea Connell
New Jersey Institute of Technology [EBER]
323 Martin Luther King Blvd
University Heights/Eberhardt Hall
Newark, NJ 07102
United States

7.

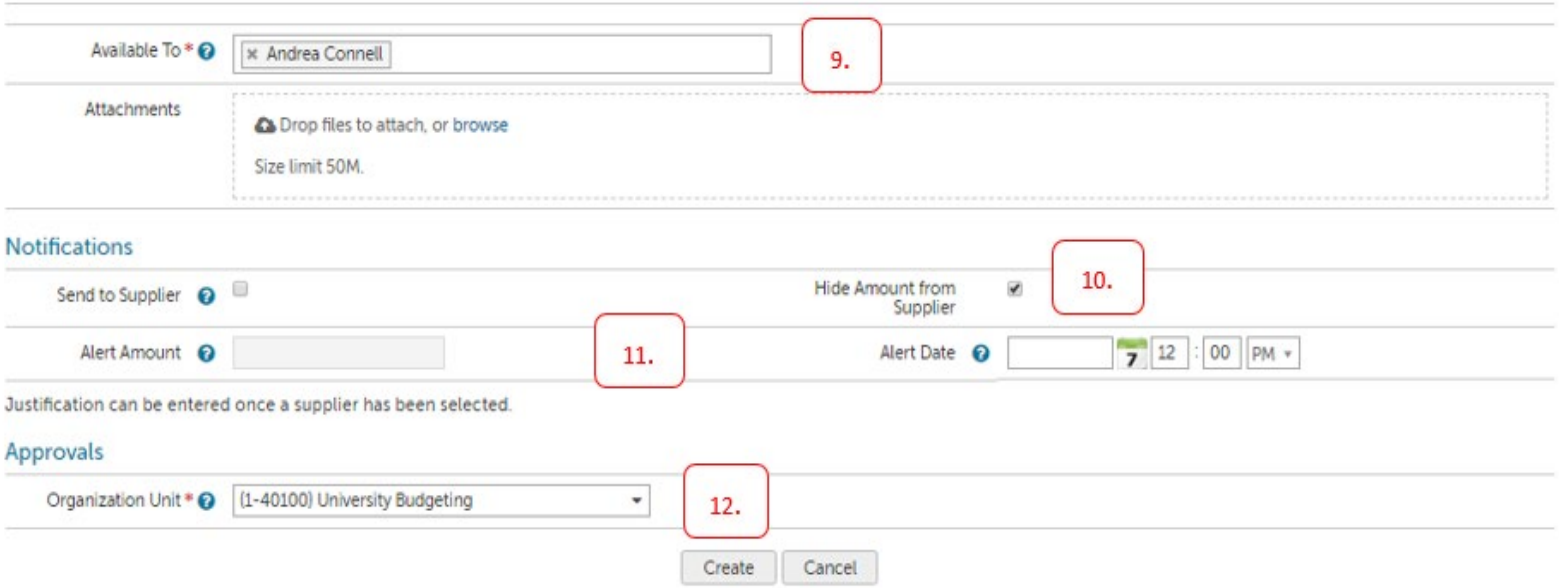
Bill To *

Attn:Accounts Payable
New Jersey Institute of Technology [NJIT]
323 Martin Luther King Blvd
Fenster Hall
Newark, NJ 07102
United States

8.

1) Name * : Identify the Blanket Order so that it is unique and easily searchable
2) Description : This information can help distinguish Blanket Orders with similar names
3) Supplier * : Identify the vendor
4) Amount * : Total dollar value of the Blanket Order
5) Valid From * / Valid To * : Date range of the Blanket Order
6) Default Account Code * : Search or Enter the Chart and Index. The fund, organization, and program will automatically populate. The account codes are searchable.
7) Ship To * : Select the NJIT building the items should be delivered to
8) Bill To * : Select the appropriate chart of accounts to create the purchase order

Blanket Order - Checkout Details Continue…



9) Available To * : Select users who will be able to enter orders against the Blanket Order
10) Hide Amount From Supplier: check if you do <u>not</u> want the supplier to see the total amount of the Blanket Order
11) Alert Amount/ Alert Date: Set thresholds to have emails sent when Blanket Order reaches a predetermined dollar amount or date
12) Organization Unit: This is based on the security and allows others within the same organization to view the order

Highlander eMerchant Support

Our website will include FAQ's, "how to" videos, and documents that you may access to assist after training. In addition, we set-up a ***Highlander eMerchant Support*** contact that will be supported by the Financial Systems & Innovations Department.

Please send your questions/concerns to: financesecurity@njit.edu

You may also contact our department by calling Nick Wilson at extension x6590.

HIGHLANDER EMERCHANT SUPPORT

New Jersey Institute of Technology
Fenster Hall, Room 550
University Heights
Newark, NJ 07102-1982

Email:
FINANCESECURITY@NJIT.EDU

Welcome To Payables

AGENDA

1. Key Terms, Invoice States and Examples

2. How to:
    - Submit an Invoice to AP that you received directly from a vendor
    - Complete receiving
    - Complete Invoice Acceptance with and without a Purchase Order
    - Complete Invoice Approvals (Approve, Decline, Accept or Reject)
    - Add a Description to a Retrofit Invoice
    - View Invoices by Purchase Order in Self Service Banner
    - View Payment Details in Self Service Banner

3. Chrome River – Employee Expense Reimbursement System

Accounts Payable Key Terms, Invoice States and Examples

Key Terms

- **Invoice Creator**- AP representative or supplier who posted the invoice.
- **Matching** – Used to reference the way an invoice is compared to the related order to ensure the invoice is ok to pay.
- **Order** - Refers to a purchase order number
- **Retrofit** - Creating an order for an invoice you already received.
- **Tolerance** - The invoice matching tolerance is the dollar amount or percentage an invoice can go over before it requires acceptance and approval.
    - NJIT's tolerance is 10% of the purchase order up to $100

Accounts Payable Key Terms, Invoice States and Examples

Invoice States

- **Canceled** - The invoice creator canceled the invoice before it was approved and in the invoice accepted state.
- **Invoice Accepted** - The invoiced items have been received, the invoice has been accepted and/or approved if required and sent to Banner for payment.
- **Invoice Rejected** - The invoice has matching exceptions and was not accepted or approved.
- **Pending Delegated Approval** - The invoice has been accepted by the buyer and routed for approval.
- **Pending Initial Acceptance** - The invoice relates to a retrofit or blank order and is pending acceptance by the buyer and creation of a retrofit requisition for approval.
- **Pending Order Acceptance** – The invoice had receiving or tolerance matching exceptions and has been sent to the buyer or requested for review and acceptance.
- **Pending Receiving** – Receiving report required. The items on the order have not been received by the buyer, browser or initiator or the order. Once the items have been received the system will reprocess for tolerance matching or acceptance.

Invoice State Examples

Canceled:

- Invoice number needs to be corrected
- Incorrect PO number used to post invoice

Invoice Accepted:

- Invoiced line items matched order
- Receiving was complete
- Invoice was accepted and/or approved

Invoice Rejected:

- The quantity of items invoiced is greater than the quantity received
- The unit price invoiced was greater than the order price
- The invoice was posted without a PO and the department has a PO it can be applied to

Pending Delegated Approval:

- The line item(s) invoiced and received is greater than the item(s) ordered and has been accepted by the buyer. (Ex. Order was for 2 items at $5.95 and 3 items at $5.95 were invoiced and received)
- Orders over $1,000 will follow the same approval routing as Banner
- Specialty items such as chemicals, computers, etc. will route to the responsible department for approval

Pending Initial Acceptance:

- Invoice was posted without a PO and assigned to a buyer for acceptance. Accepting the invoice is stating that the invoice is correct and the items were received
- Invoice was posted to a blanket order and has to be accepted by the buyer to create a retrofit release order to reduce the available funds on the PO. Again accepting the invoice is stating that the invoice is correct and the items were received

Note: When order receiving for your requisition is marked receive automatically, an invoice should not be accepted if the line item(s) have not been received, as this will replace you having to complete a receiving report..

Pending Order Acceptance:

- The line item(s) invoiced is greater than the item(s) ordered (Ex. Order was for 2 items at $5.95 and 3 items at $5.95 were invoiced and received

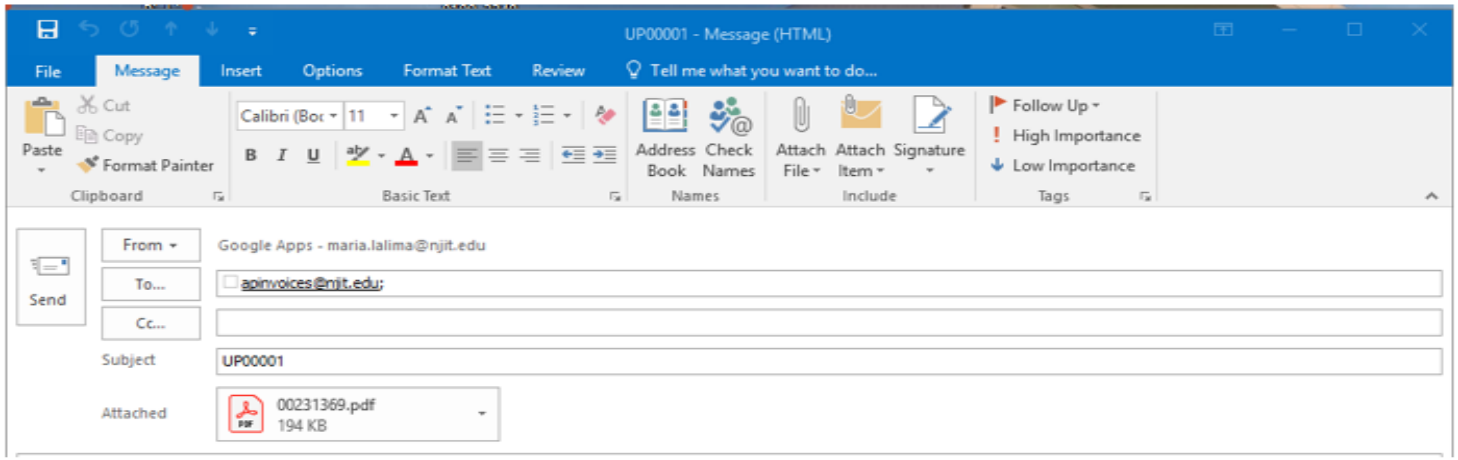
Pending Receiving:

- Receiving report not complete
- Only 1 of 2 items have been received. All invoiced items must be received before the invoice is sent to Banner for payment

HOW TO SUBMIT AN INVOICE TO ACCOUNTS PAYABLE THAT YOU RECEIVED DIRECTLY FROM THE VENDOR

If you receive an invoice directly from the vendor that relates to Highlander eMerchant please submit as follows:

- Send to apinvoices@njit.edu
- Email may contain only 1 Invoice per submission
- The Order Number (UP000001) must be listed in the subject line of the email



NOTE: Accounts Payable does not see invoices that are attached to your requisition in eMerchant. In order for your invoice to be processed it must be submitted in the format listed above.

Highlander eMerchant – Invoice Acceptance

As a buyer, you will receive invoices for acceptance when they are in the following state:

Pending Order/Buyer Acceptance – The invoice had receiving or tolerance exceptions and has been sent to the buyer or requestor for review and acceptance.

Pending Initial Acceptance - The invoice relates to a retrofit or blanket order and is awaiting acceptance by the buyer and creation of a retrofit requisition approval.

NJIT New Jersey Institute of Technology

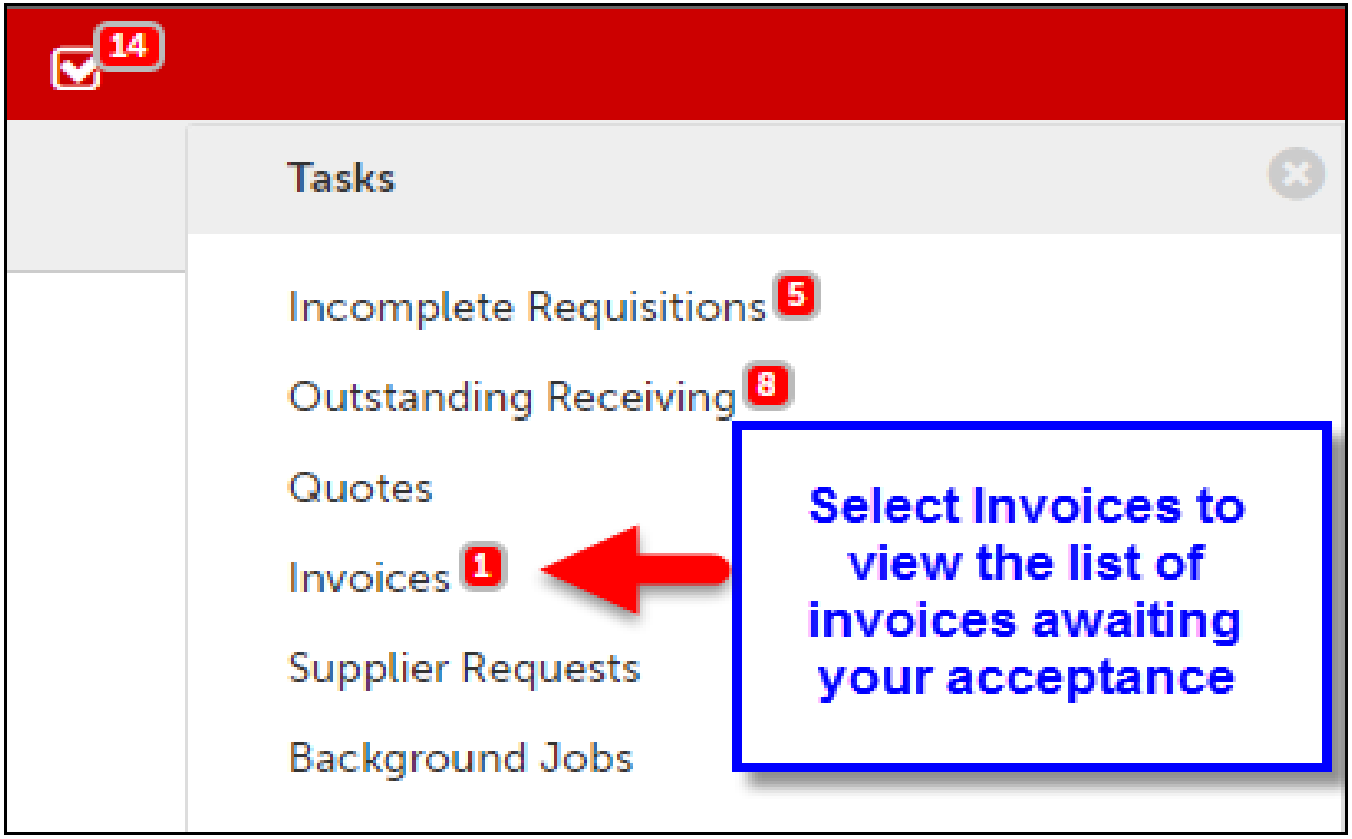
Outstanding Tasks

Invoice Acceptance

Date	Task	Description
6/4/2018 11:09 AM	Invoice 50280197	Invoice 50280197 failed matching and requires your acceptance.
4/26/2018 12:19 PM	Invoice 042618C-CR	Invoice 042618C-CR failed matching and requires your acceptance.

View all your Invoice Acceptance tasks.

Click here to log onto Highlander eMerchant to check your Outstanding Tasks


14
Tasks
Incomplete Requisitions 5
Outstanding Receiving 8
Quotes
Invoices 1
Supplier Requests
Background Jobs
Select Invoices to view the list of invoices awaiting your acceptance

Accepting Invoices

Before accepting an invoice check to see why the invoice needs acceptance:

- When Pending Order/Buyer Acceptance, next to the invoice State click on the ℹ to see why the invoice did not match
- When Pending Initial Acceptance, verify if the invoice is retrofit or related to a blanket order

Items

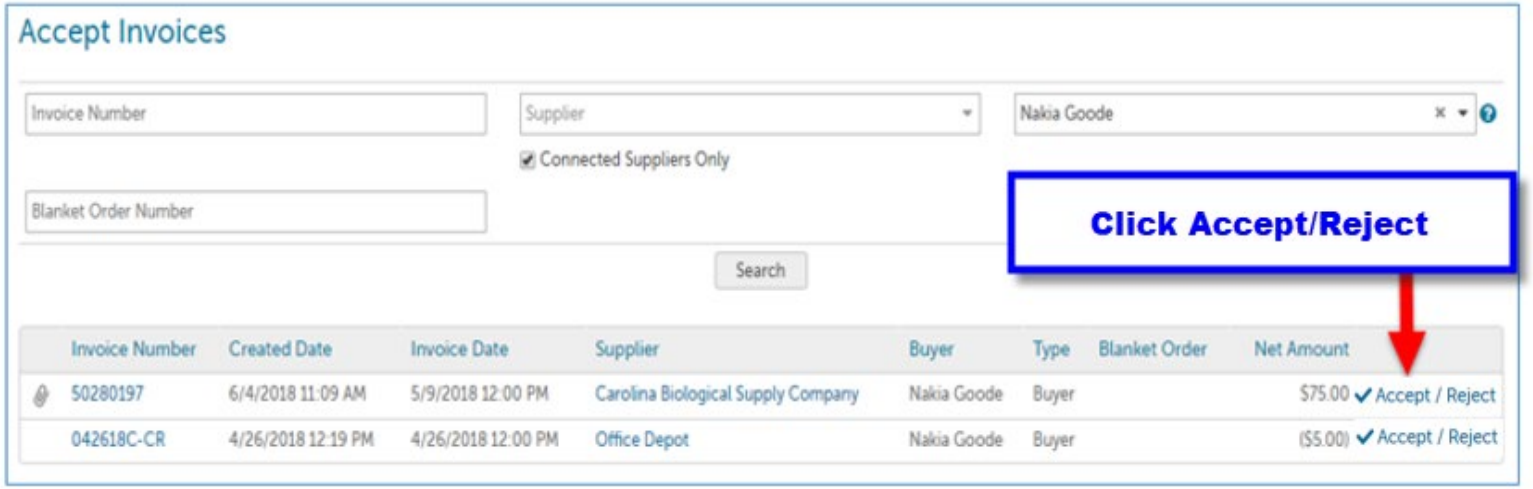
Items

Filter items

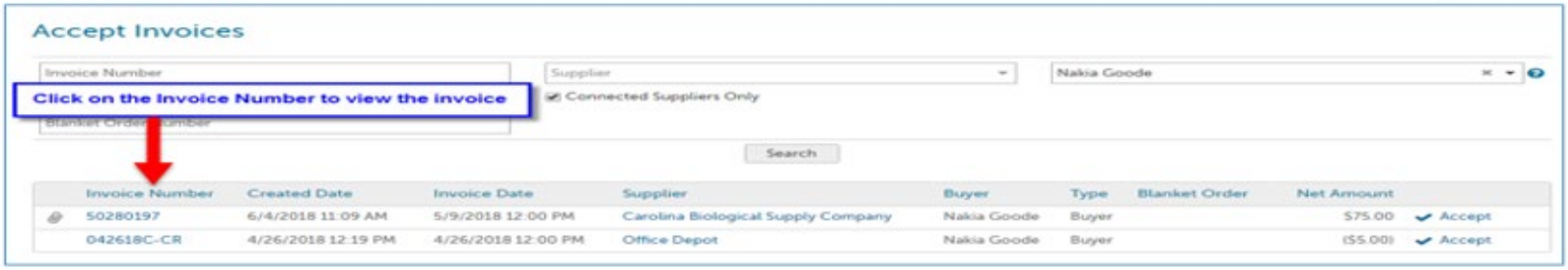
The invoice line amount ($75.00) is greater than the amount remaining to be invoiced ($45.27) on the order line and any tolerances set by the community.

Line	Order	Description	State	y.	Price	Subtotal	
1	UP100197	"The Science Of", Poster Set (571110)	Pending Buyer Acceptance ℹ	1	$75.00 / Each	$75.00	
			Order Item	1	$45.27 / Each	$45.27	+ Invoice Order
			Receiving	0	$45.27 / Each	$0.00	
					Subtotal	$75.00	
					Shipping	$0.00	
					Tax	$0.00	
					Total	$75.00	

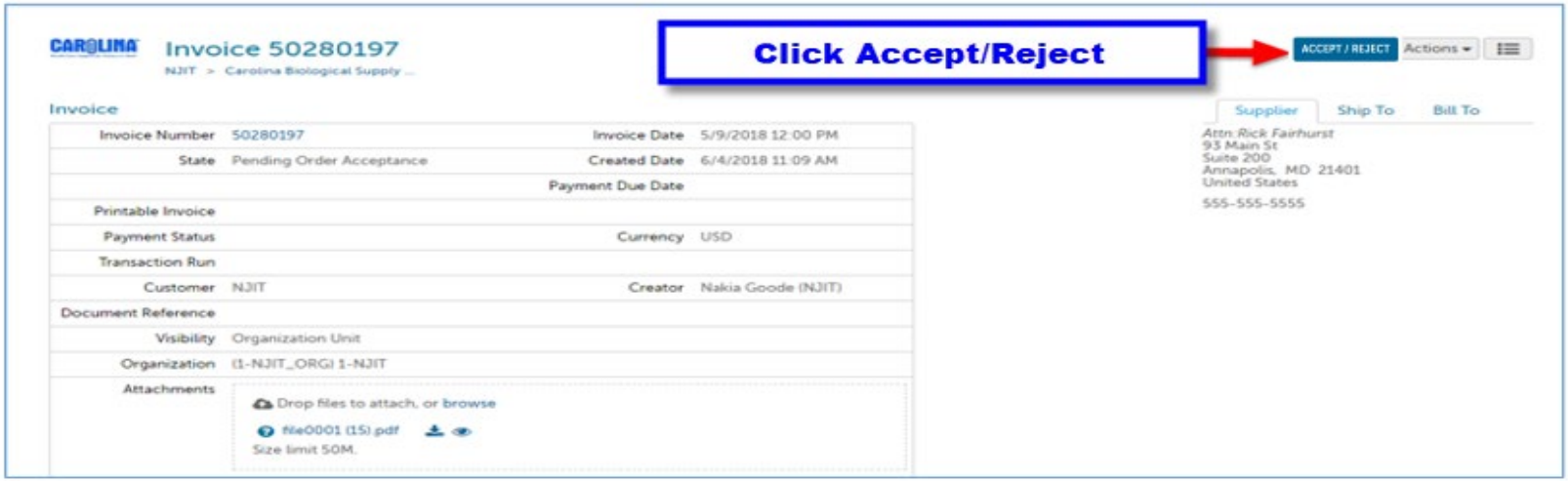
Option 1: Accept from the Accept Invoices page that lists all invoices awaiting your acceptance. Click ✔ Accept to open the acceptance popup.

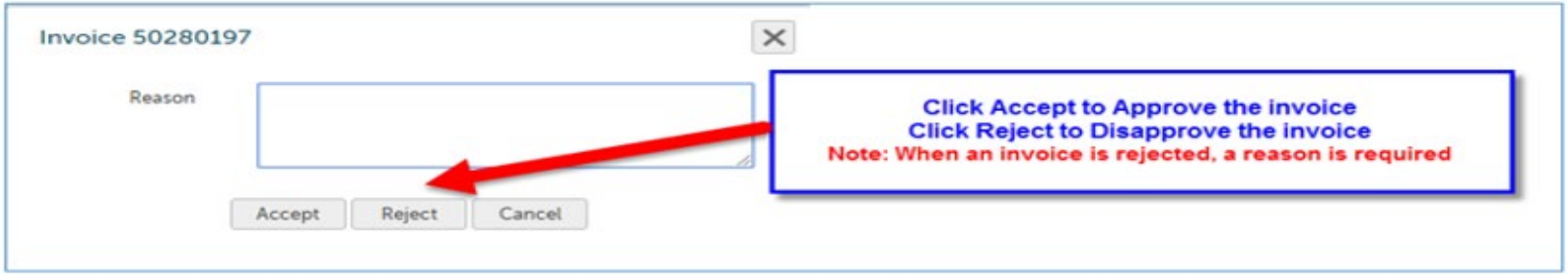


Option 2: From the Accept Invoices screen, click on the Invoice Number to go to the View Invoice page



Click the Accept button in the top right of the View Invoice page next to the Actions menu.





Highlander eMerchant - Invoice Approvals

As an approver, you will receive invoices for approval when they are in the following state:

Pending Delegated Approval- The invoice has been accepted by the buyer and routed for approval. It is pending approval by the approver in the approval chain.

and/or

The invoice had receiving or tolerance exceptions and additional budget is needed to pay the difference from what was encumbered on the PO.

Invoice Approval Notifications

Approvers will receive an approval notification email, prompting them to log on to Highlander eMerchant, check their Task Badge (located in the top right corner of Highlander eMerchant) for invoices awaiting their approval.

- Invoice Approval Email Notification:

NJIT New Jersey Institute of Technology

Invoice 9300260618 for Graybar has been submitted against order UP100274.
The invoice requires your approval as it has exceeded the matching tolerance.

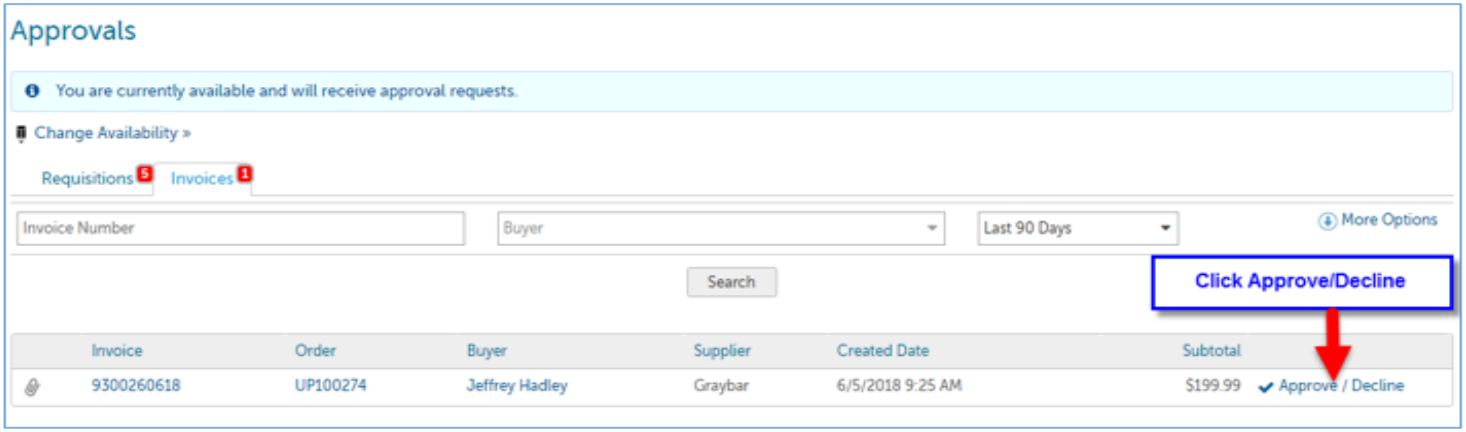
Please click here to login and view the invoice.

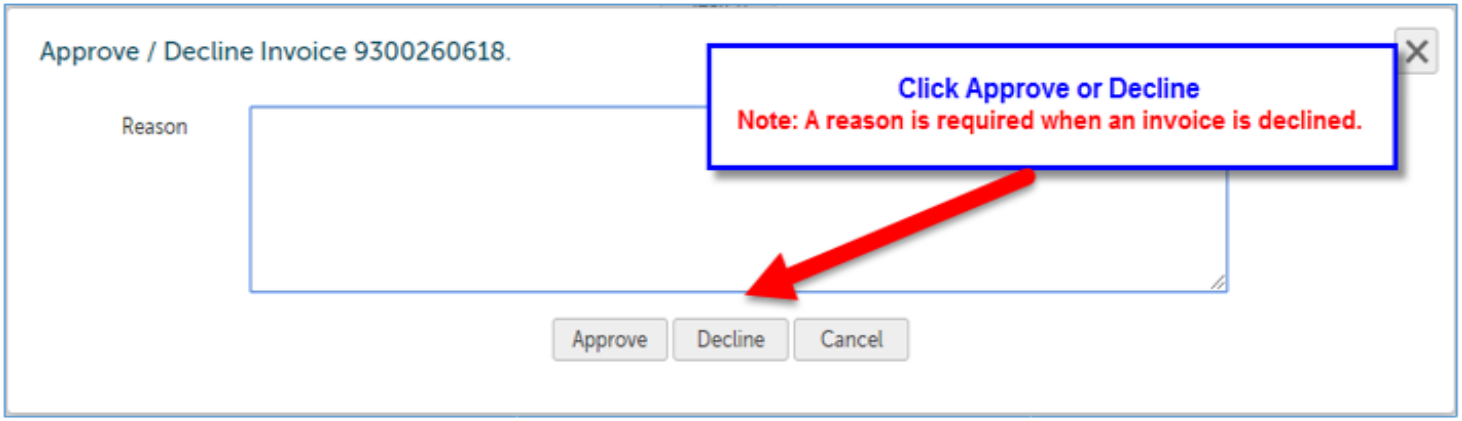
unimarket

- Task badge:

Approving Invoices

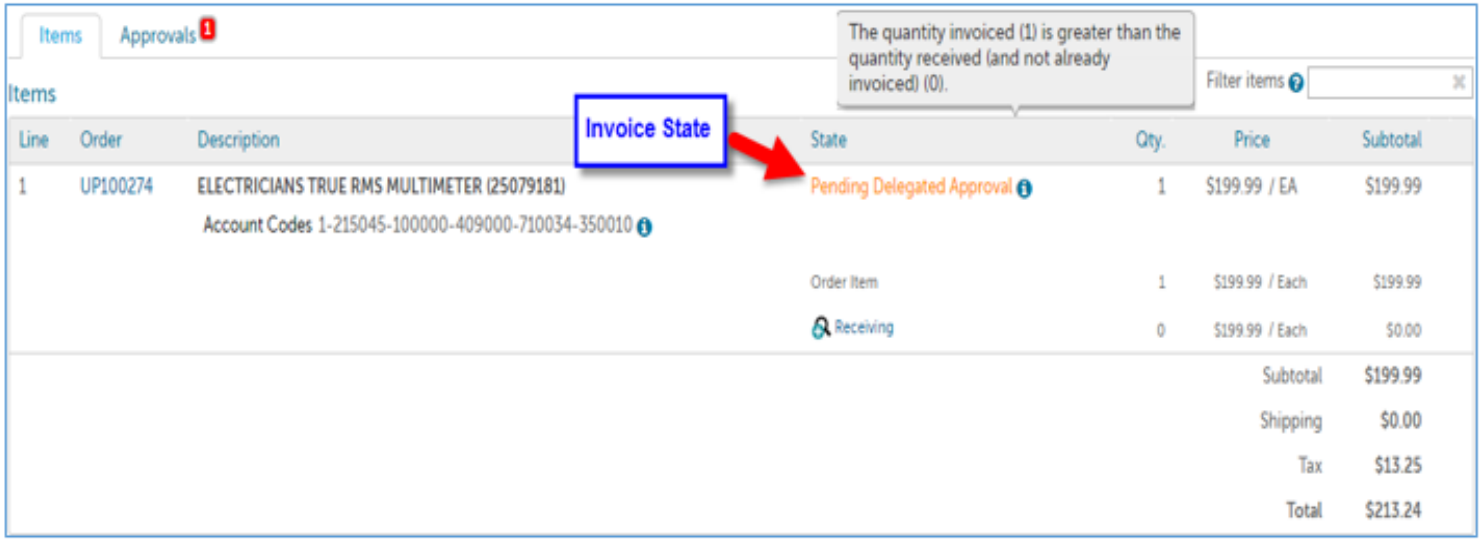
Option 1: Approve from the Approvals page that lists all of your approvals in separate tabs for Requisitions and Invoices. Click ✔ Approve / Decline to open the approvals popup.





Before approving an invoice check to see why the invoice did not match the PO and was sent for approval:

- Next to the invoice State click on the ℹ to see why the invoice did not match



View prior approvals:

- Next to the Items tab, select the Approvals tab to view the approval history

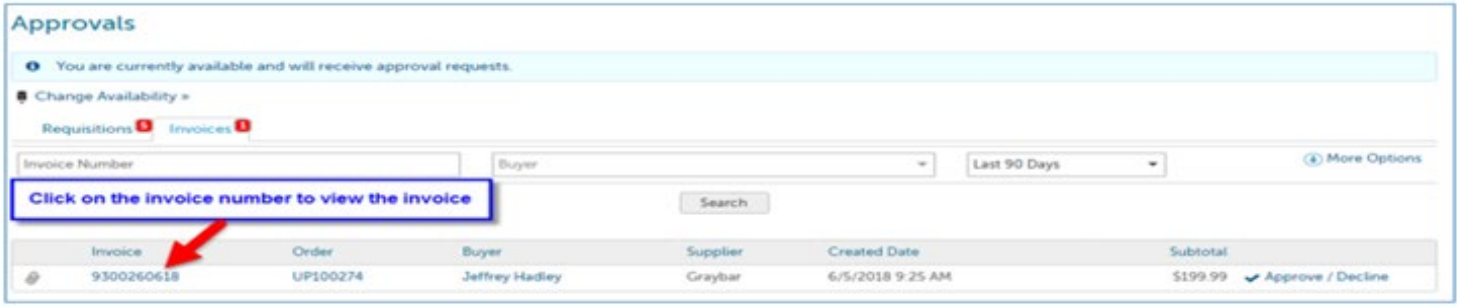
Items | Approvals

Dept Invoice Exception Approvals: Example Approval Chain [1-215045-100000-409000-710034-350010] — In Progress

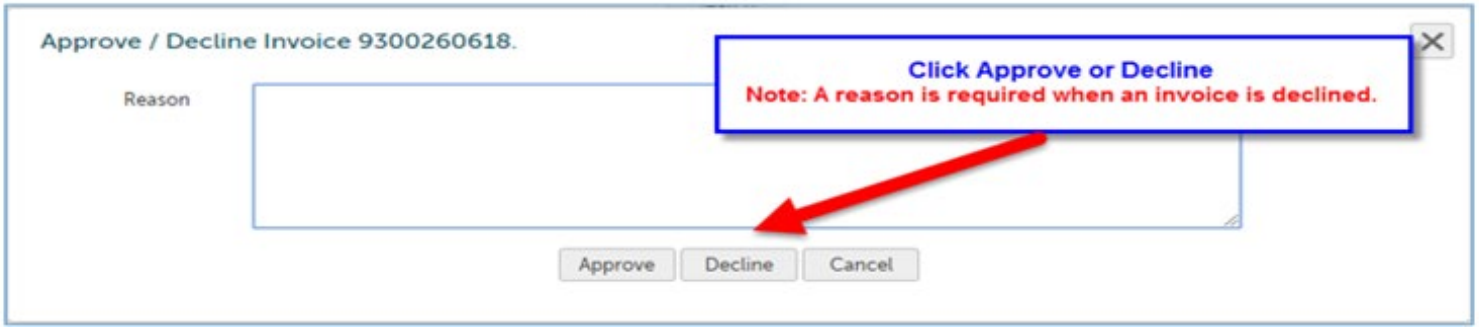
Approver	Created Date	Completed Date	Level	Type	
FSI			$5,000 ($5,000.00)		Escalated
Andrea Connell					
Jessica Jimenez					
John Gruppo					
Kevin Jones					
Lily Chang					
Nicholas Wilson					
Priscilla Milne					
Sharyn Serafin					
Steve St edward					
Viola Clyburn					
Steve St edward			Clearing Authority ($999,999,999.00)		Escalated

Purchasing Review: Purchasing (Stan) [1-215045-100000-409000-710034-350010]

Option 2: From the Approvals screen, click on the Invoice Number to go to the View Invoice page



Click the Approval button in the top right of the View Invoice page next to the Actions menu.



Invoice Acceptance without a Purchase Order

Invoices received without a Purchase Order will be processed by Accounts Payable and assigned to a Buyer based on the information provided on the invoice. As a buyer when an invoice has been assigned to you, you have the option to accept, enter the funding source or assign it to blanket order, and sendoff for approval or reject and enter the reason why.

Invoice Acceptance Notifications

Buyers will receive an email indicating an invoice has been loaded and assigned to them for approval.

- Invoice Acceptance Email Notification:

NJIT New Jersey Institute of Technology

Invoice 8766800 has been loaded and assigned to you for approval.
Please login to review the invoice. If accepted, the invoice items will be placed in an incomplete requisition to create a retrofit order for checkout, coding and approval.

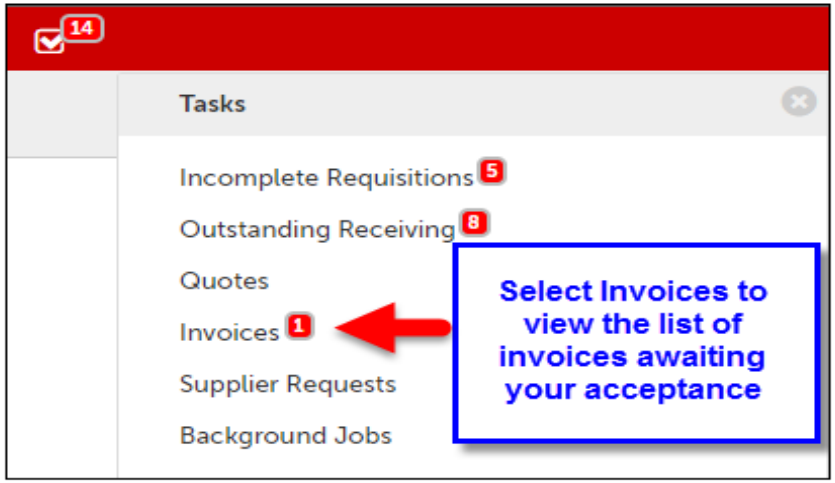
Invoice Number	8766800
Supplier	Fisher Scientific
Creator	Nakia Goode

Item	Code	Qty	Unit Price	UOM	Subtotal
Supplies	NJIT193	2	$25.21	Each	$50.42

Please login to review the invoice.

unimarket

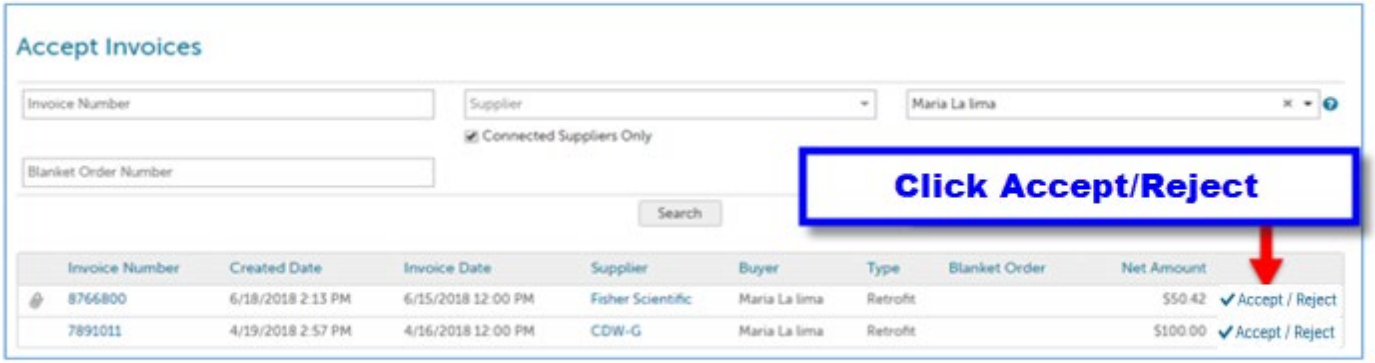
- Task badge:



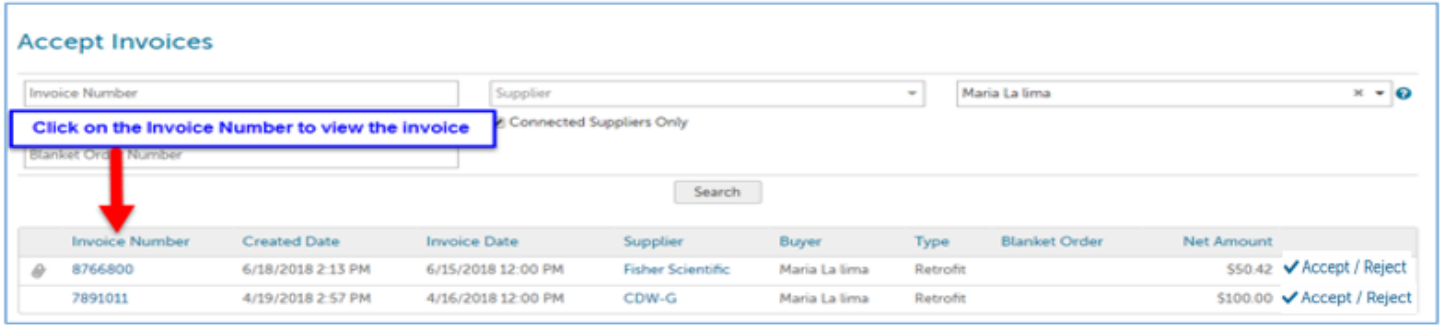
Accepting Invoices

Before accepting the invoice and creating a retrofit order, check to ensure a PO doesn't already exist for the order. If another PO does exist, the invoice should be rejected and the PO number should be included in the reason for rejection and Accounts Payable can repost the invoice using the PO number.

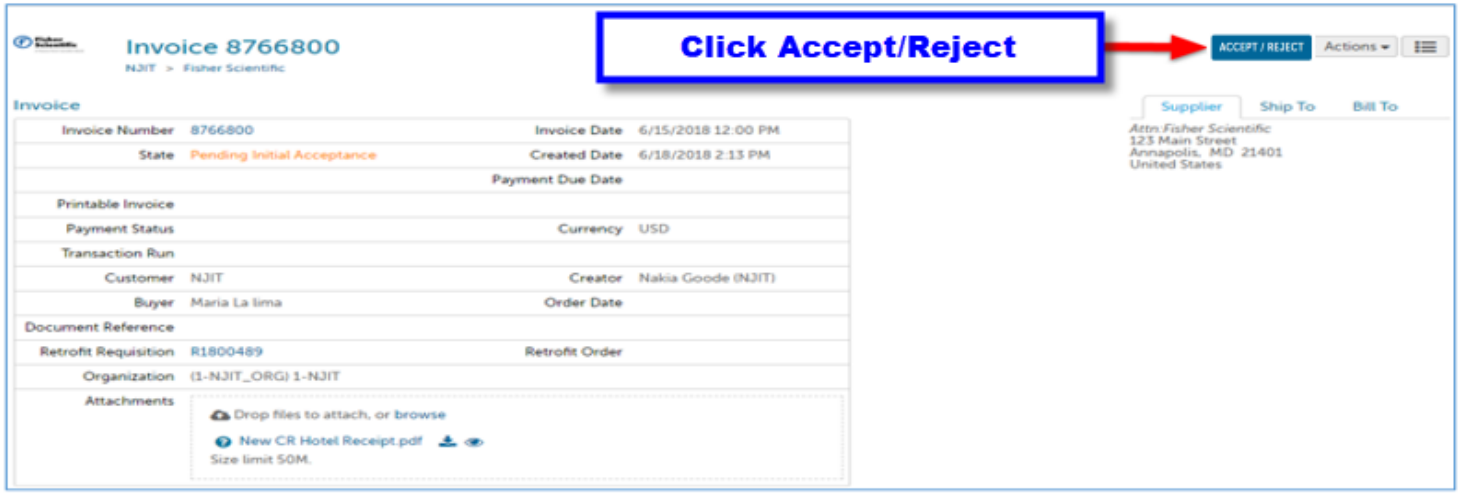
Option 1: Accept from the Accept Invoices page that lists all invoices awaiting your acceptance. Click ✔ Accept to open the acceptance popup.



Option 2: From the Accept Invoices screen, click on the Invoice Number to go to the View Invoice page



Click the Accept button in the top right of the View Invoice page next to the Actions menu.



If accepted, the invoice items will be placed in an incomplete requisition to create a retrofit for checkout, coding and approval or if related to a blanket order will create a release retrofit order for checkout and approval.

Checkout

✔ Incomplete Requisition R1800489 has been created from Invoice 8766800.

▾ Locations — New Jersey Institute of Technology / New Jersey Institute of Technology

Ship To * (FENS)-323 Martin Luther King Blvd, Fenster Hall

Attn * Maria La lima
New Jersey Institute of Technology [FENS]
323 Martin Luther King Blvd
University Heights/Fenster Hall
Newark, NJ 07102
United States

Bill To * New Jersey Institute of Technology

Attn:Accounts Payable
New Jersey Institute of Technology [NJIT]
323 Martin Luther King Blvd
Fenster Hall
Newark, NJ 07102
United States

Verify all items marked with the *
Ship To
Bill To
Attn
Order Date
Order Submission
Order Receiving
Organization Unit

▾ Order Type — Retrofit

Retrofit Order ☑

Related Invoice Number 8766800

Order Date * 6/15/2018 12 : 00 PM

Order Submission * Do not Send

Fisher Scientific — + Add Notes

⚠ Warning: This supplier has order integration enabled, and so may not see these Notes or Order Attachments.

Product	Qty.	Subtotal	Tax	
Supplies Unit Price: $25.21 / Each	2	$50.42	$0.00	Edit

Delivery Date 12 : 00 PM

Account 1 215430 100000 414000 734010 350010 Split

Enter the account information or select the Blanket Order number

Subtotal	$50.42
Shipping *	$ 0 — $0.00
Tax	$0.00
Total	$50.42

Delivery Notes

Order Attachments — Drop files to attach, or browse. Size limit 50M.

Blanket Order

Order Receiving * Receive Automatically

▾ Justification — Justification Instructions

Justification

Justification Attachments — Drop files to attach, or browse. Size limit 50M.

Justification Type — Justification Instructions

Furniture — Ensure that you have checked with Facilities for any available surplus

Sole Source — How to and when to complete a Sole Source for Services or Equipment

Consultants — What is needed before a consulting requisition can be created or approved.

▾ Organization — Accounts Payable

Organization Unit * (1-414000) Accounts Payable

Click Checkout to Complete the Retrofit Requisition or Reassign to Assign it to another Buyer for Approval

✔ Incomplete Requisition R1800489 has been created from Invoice 8766800.

Checkout | Save | Reassign | Cancel

How to Add a Description to Retrofit Invoices/Orders

- After you have Accepted the invoice and you are now in the Incomplete Requisition screen
    - Scroll down to the Product Line
    - Select Edit Product

Marketplace NJIT Highlander eMerchant

Bill To (1-NJIT_ORG) New Jersey Institute of...

Attn:Accounts Payable
New Jersey Institute of Technology (NJIT)
323 Martin Luther King Blvd
Fenster Hall
Newark, NJ 07102
United States

Ship To (FENS)-323 Martin Luther King Blvd, Fe...

Attn
Nakia Goodie

New Jersey Institute of Technology (FENS)
323 Martin Luther King Blvd
University Heights/Fenster Hall
Newark, NJ 07102
United States

Organization Accounts Payable

Organization Unit
(1-41400) Accounts Payable

Order Type Retrofit

Retrofit Order

Related Invoice Number

Order Date
10/7/2017 12:00 PM

Order Submission
Do not Send

Office Depot

Product Line

Add notes

Warning: This supplier has order integration enabled, and so may not see these Notes or Order Attachments.

Product	Delivery date	Unit price	Qty.	Subtotal	Tax	
retrofit	12:00 PM	$1.73 / Each	1	$1.73	$0.00	Edit product

COAS INDEX FUND ORGN ACCT PROG

Subtotal	$1.73	
Shipping	$ 0	$0.00
Tax	$0.00	
Total	$1.73	

Delivery notes

Order attachments
You can choose which order attachments will be sent to the supplier together with the order.
Drop files to attach, or browse
Size limit 50M.

Order receiving
Receive Automatically

Justification

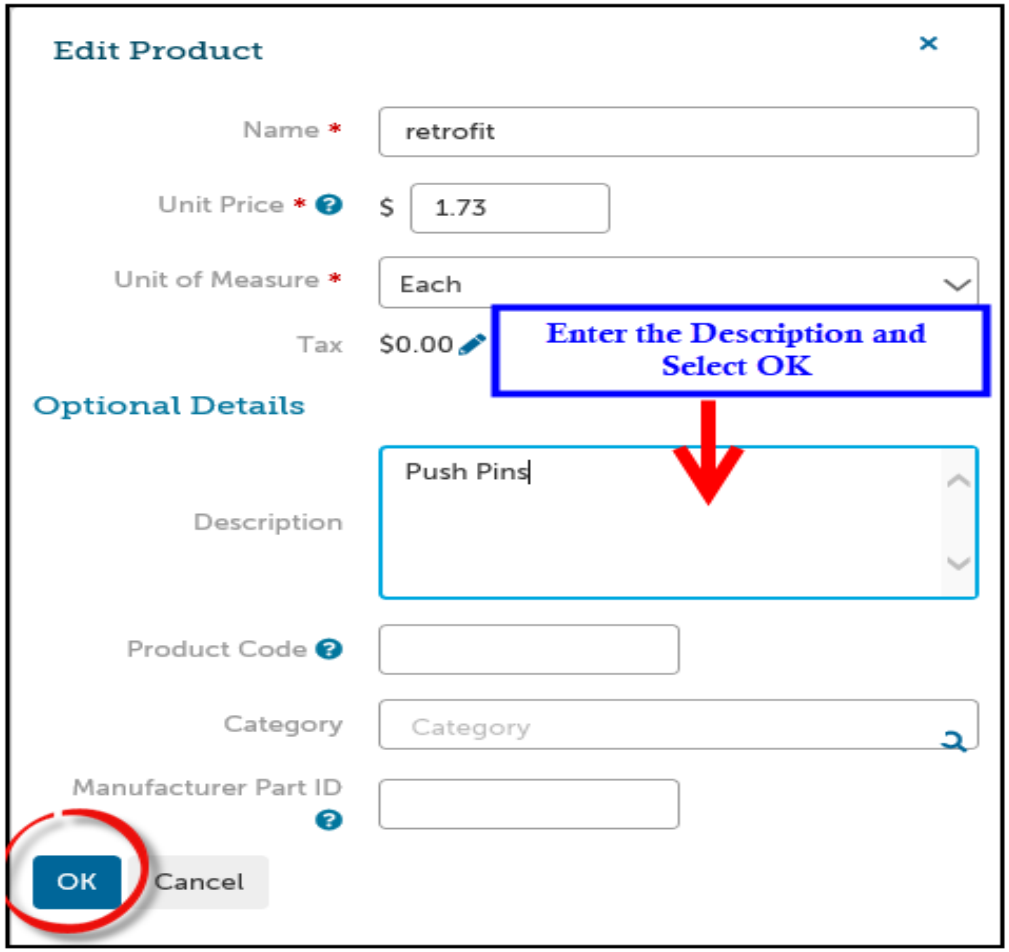
The justification and attachments are for review by the approver. They will not be sent to the supplier.

Justification

Justification Attachments
Drop files to attach, or browse
Size limit 50M.

Checkout Save Reassign Cancel

- When the Edit Product box appears, enter the description and select ok



NJIT New Jersey Institute of Technology

View Documents

Personal Information | Employee | Finance

Search Go

RETURN TO MENU | SITE MAP | HELP | EXIT

Finance Menu

Budget Queries
Encumbrance Query
Approve Documents
View Document
Delete Finance Template

Click here to view documents

[Budget Queries | Encumbrance Query | Approve Documents | View Document | Delete Finance Template]

RELEASE: 8.8.3

NJIT New Jersey Institute of Technology

Personal Information | Employee | Finance

Search [ ] Go

MENU | SITE MAP | HELP | EXIT

View Document

To display the details of a document enter parameters then select View document. To display approval history for a document enter parameters then select Approval history. If you do not know the document number, select Document Number to access the Code Lookup feature. This enables you to perform a query and obtain a list of document numbers to choose from.

Choose type: Purchase Order | Document Number | up102147

Enter the eMerchant Purchase Order #

Submission#: [ ] Change Seq# [ ] Reference Number [ ]

Use the drop down arrow to select purchase Order

Disp

◉ Yes ○ No

Click here to view invoices posted to the PO

y Commodity Text

○ All ◉ Printable ○ None ○ All ◉ Printable ○ None

View document | Approval history

NJIT New Jersey Institute of Technology

Personal Information | Employee | Finance

Search [ ] Go

MENU | SITE MAP | HELP | EXIT

View Document

To display the details of a document enter parameters then select View document. To display approval history for a document enter parameters then select Approval history. If you do not know the document number, select Document Number to access the Code Lookup feature. This enables you to perform a query and obtain a list of document numbers to choose from.

Choose type: Purchase Order | Document Number | UP102147

Enter the eMerchant Purchase Order #

Submission#: [ ] **Change Seq#** [ ] Reference Number [ ]

Use the drop down arrow to select Purchase Order

Display Document/Line Item Text			Display Commodity Text		
○ All	◉ Printable	○ None	○ All	◉ Printable	○ None

View document | Approval history

nt | Delete Finance Template]

RELEASE: 8.7.0.2

Click here to view invoices posted to the Purchase Order

Purchase Order Header

Purchase Order	Change#	Order Date	Trans Date	Delivery Date	Print Date	Total
UP102147		Feb 20, 2019	Feb 20, 2019	Feb 26, 2019	Feb 20, 2019	908.26

Origin:	EPUNIMARKET		Reference Number:		R1002073
Complete:	Y	Approved:	Y	Type:	Regular
Cancel Reason:				Date:	
Requestor:	Unimarket PO User		403000	Purchasing	
Accounting:	Commodity Level				

Ship to:	New Jersey Institute of Technology
	182 Central Avenue
	University Heights
	CAB
	Newark, NJ 07102
Attention:	
Contact:	
Phone Number:	

Vendor:	31154510 George Patton Associates Inc.
	Customer Support
	DisplaYS2GO
	81 Commerce Dr
	Fall River, MA 02720-4743
Phone Number:	800-572-2194
Fax Number:	
Currency:	

Purchase Order Commodities

Item	Commodity	Description	U/M	Qty	Unit Price	Ext Amount	
				Disc	Addl	Tax	Cost
1		Glass Display Cases	EA	2	454.13	908.26	
				0.00	0.00	0.00	908.26

Purchase Order Accounting

Seq#	COA	FY	Index	Fund	Orgn	Acct	Prog	Actv	Locn	Proj	NSFSusp	NSFOvr	Susp	Amount
1	1	19	213310	100000	203000	711015	250010				N	N	N	908.26
Total of displayed sequences:														908.26

Related Documents

Transaction Date	Document Type	Document Code	Status Indicator
Apr 03, 2019	Invoice	UI003362	Paid
Apr 05, 2019	Check Disbursement	00245366	Final Reconciliation