


Logging In

- 1) Open your Internet Browser
- 2) Enter the following in your address bar: <https://www5.paymentnet.com>
- 3) Enter the following on the PaymentNet Login Screen:
Organization ID: unipenn
User ID: {your PennKey}
Pass Phrase: {your Pass Phrase}

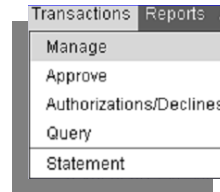
Note: The Pass Phrase is **not** your PennKey password. To generate your initial Pass Phrase click "Forgot Your Pass Phrase" the first time you log in. A temporary Pass Phrase will be sent to your University e-mail address.

Changing Pass Phrase

- 1) From the menu bar on the home page, select **My Profile**

- 2) Enter in the new Pass Phrase and then again to confirm it.
- 3) Click .
- 4) The new Pass Phrase will take effect upon your next login.

Viewing Transactions or Authorizations/Declines

- 1) From the menu bar on the home page, select **Transactions** then **Manage***



- 2) This will take you to the Transactions List page
 Cardholders will see a list displaying all (their own) transactions; Transaction Approvers and Managers will see the transactions of all individuals in their area of responsibility

*Or, for a real-time view of Authorizations/Declines click Transactions then Authorizations/Declines

Reviewing Transactions

- 1) Click on a transaction line to compare the transaction details (e.g., amounts) with your receipts.
- 2) Add information to the **Transaction Notes** field, including:
 - A brief description of the item(s) purchased,
 - The business purpose of the purchase,
 - Changes in the account to be charged (if any)
- 3) Click , then click to return to the Transaction List page

DISPUTING A TRANSACTION

*Before you dispute a transaction, you **must** first attempt to resolve the issue directly with the merchant!*

- 1) From the Transaction List, click on the transaction you need to dispute.
- 2) Click .
- 3) Select a Dispute Reason from the drop-down list.
- 4) Confirm your **E-mail Address** and enter the **Merchant State**, if requested.
- 5) Enter any additional information required and Click .

Track the status of your dispute online on the Transaction List.

- = Dispute Submitted (red)
- = Dispute in Process (yellow)
- = Dispute Resolved (green)

Click the colored squares and follow steps to Undo or Resolve your dispute.

Statement of Account Report

Scheduling your Report

*IMPORTANT: The instructions listed here for scheduling a Statement of Account Report are for **CARDHOLDERS only***

Transaction Approvers and Managers should not run or schedule reports based on this Quick Reference Guide. See the Purchasing Card FAQ's for more information

- 1) From the menu bar on the home page, select **My Profile**



- 2) Check the check-box for Reports



Verify your e-mail address and click Save **Save**

- 3) From the menu bar on the home page, select **Reports** and **Create**



- 4) Select **Statement of Account**

Statement of Account

Statement of Account Report

Scheduling your Report (Continued)

- 5) On the Report Detail screen:
 - Enter a new name for the report in the **Name** field (towards the top of the screen); Click the check box to **Schedule** your report
 - Select **Cycle** from the Frequency drop-down box; Select **Billing Cycle** from the Cycle drop-down box



- 6) Click Save **Save**

Printing your Report

- 1) Log into PaymentNet after receiving your notification e-mail
- 2) Click on the **Items Awaiting Your Action** link on the home page



- 3) Click on the report name to view your Statement of Account report



- 4) Print using your local printer

Cardholder Support

Lost/Stolen Cards or suspected fraud should be immediately reported to the issuing bank at:

1-800-316-6056

Note: Cardholder Support will not be able to assist with PaymentNet-specific questions

University Purchasing Card Program Support

Questions regarding the University Purchasing Card Program or PaymentNet should be referred to the Program Administrator at:

(215)898-1683

or pnet@pobox.upenn.edu

Important Links

PaymentNet Logon Page:
www5.paymentnet.com

Purchasing Card/PaymentNet FAQ's:
www.purchasing.upenn.edu/buytools/card.php