PEPPM BUYER'S GUIDE

PEPPM®

Technology Bidding and Purchasing Program

www.peppm.org

Dear PEPPM Buyer:

Welcome to the PEPPM Buyer's Guide! We look forward to providing schools and agencies like yours with excellent services, bid protection and pricing for the top brands of technology.

For those of you who are new to the PEPPM Program, this bid is the result of a nationally affiliated group of Agencies, coordinated by the Central Susquehanna Intermediate Unit, a.k.a. "CSIU", which seeks and awards bids on technology equipment, software and supplies on behalf of schools, agencies and libraries. This program called PEPPM (pronounced PEP-um), is a national technology bidding and purchasing program for schools, agencies and libraries.

The educational agencies soliciting the bids for their respective jurisdiction have individually awarded bids in their respective states, based on their own applicable statutes. However, the Agencies come together nationally for the purpose of aggregating their demand for product and their buying power. In so doing, they have coordinated the bidding process with each other, and have centrally evaluated the bid responses. After awards, they coordinate on publicizing the contracts to school districts and other eligible agencies.

We have created this PEPPM Buyer's Guide to assist you in making the most of the PEPPM Program opportunity. If you have been part of the program in previous years, this Guide will highlight some program improvements and changes. If you are just learning about PEPPM, this Guide will provide detailed instructions and information to familiarize you with the PEPPM Program.

Program Partner: Epylon Corporation

Throughout this Guide, Epylon Corporation will be mentioned as a point of contact for many aspects of the PEPPM Program (e.g., eCommerce, vendor management, reporting.)

Since 2000, PEPPM has collaborated with Epylon Corporation to provide increased value to buyers and vendor partners in the PEPPM Program. Epylon Corporation is a California company specializing in strategic sourcing, contract development, co-op management and eCommerce for educational agencies.

We are pleased to announce that Epylon continues to be involved in many aspects of the PEPPM Program including bid planning and evaluation, expanded state relationships, sales and marketing support, order processing infrastructure, eCommerce, and quarterly vendor and educational agency reporting.

Epylon's website is located at www.epylon.com. The company is headquartered in Danville, California at the following address:

Epylon Corporation
630 San Ramon Valley Blvd.
Suite 210
Danville, CA 94526

General contact information for the Epylon staff most directly involved with PEPPM is as follows:

Ted Witt – Vice President
925-407-1035 – office
916-826-2039 – mobile
tedwitt@epylon.com

Suzanne Barchi – Manager, Education Accounts
925-407-1032 – office
209-992-6181 – mobile
sbarchi@epylon.com

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Section 1: About the PEPPM Program

Topic 1.1	Program Highlights

Great Prices!

PEPPM publicly posts up-to-date line item price information for all awarded product lines as www.peppm.org. Prices are also accessible to Epylon eCommerce users. PEPPM gives eligible buyers the unparalled ability to compare product lines across the same terms and conditions.

All prices are posted for a quantity of 1, but volume discounts can be negotiated with the vendor according to bid terms and conditions.

The nature of technology results in rapidly changing prices and products. Volume also makes a difference in price.

PEPPM has negotiated outstanding prices with key technology vendors. A key strategy has been to employ the "Most Favored Nations" clause.

This important stipulation of all PEPPM awards assures your agency that the same vendor is not selling the same product with similar quantity and terms to another educational agency for a lower price.

The PEPPM Contracts are structured for flexibility while assuring you the best price.

- **Volume discounts** can be applied to purchases. PEPPM prices are publicly posted at a quantity of 1, but you are able to negotiate discounts based on volume on a purchase with that vendor.

- **Most Favored Nations** pricing terms assures you that PEPPM prices will always meet or beat similar statewide contract prices from a PEPPM Vendor.

- **Shipping** is included on all orders over $500. Many PEPPM Vendors may waive shipping charges for orders less than $500.

See Section 2.2 PEPPM Pricing Facts

Terms and Conditions Protect Buyer

PEPPM has contract benefits that go beyond the price

- Powerful Terms and Conditions provide relief from common headaches associated with technology purchases
- PEPPM conducts competitive sealed bids according to state statutes that can be used statewide by eligible buyers
- PEPPM staff review paper-based orders for accuracy and readability, making corrections with buyer permission and then archives them before submitting to vendor
- PEPPM staff provides support (administrative, operational, technical interface and conflict resolution) to buyers such as expediting orders, discontinued product replacement terms, etc
- PEPPM archives pricing and purchase orders for audit verification, supporting buyers that may be unable to provide adequate documentation for their purchase in the event of an audit

E-rate Purchases

Yes, you can use PEPPM Contracts for E-rate purchases! PEPPM is considered a "Master State Contract" for Pennsylvania Schools and Libraries by The Schools and Libraries Program of the Universal Service Fund (SLD).

See information provided in this Guide in Section 3.2. The PEPPM website at www.peppm.org/pa/erate has even more information. Also, you can contact the PEPPM Staff with specific questions as it relates to using PEPPM contracts for E-rate purchases.

E-rate Questions Desk at
CSIU 570-523-1155 x2144.

See Section 3.2 Using PEPPM for E-rate Purchases

Quarterly Reports	If your organization chooses, a business official can receive a quarterly report (via e-mail) of the purchase orders issued through PEPPM by your organization. These reports can assist your organization with: • Asset tracking • Vendor management • Price performance **For a sample report and more information on reports, see Section 3.3 Reports**
Epylon eCommerce	Through PEPPM's alliance with Epylon, we are able to offer all PEPPM pricing with the searchable Epylon Contract database. **See Section 4: Epylon eCommerce**
Electronic Ordering System	All orders faxed in to PEPPM by educational agencies will be transformed into eCommerce orders on your behalf. This enables suppliers to receive all orders electronically even if your organization is not yet utilizing eCommerce to place PEPPM orders. In addition to benefiting vendors, you will be able to access your online account to view your orders. **See Section 4.1 Using Epylon eCommerce to Place a PEPPM Order**
Audit Support	**We know of no PEPPM bid protected purchase that has ever been cited in an audit!** PEPPM regularly provides supporting documentation to state auditors and educational agencies undergoing an audit. **See Section 3.1 Bid Protection Services**

Improving Communication

To improve communication between PEPPM and the decision-makers in educational agencies, we have listed all the PEPPM Program contact points for your easy reference. If you have questions or feedback, please contact us.

See Section 5 Communication and Program Feedback

Section 1: About the PEPPM Program

Topic 1.2	Where PEPPM Contracts are Valid

States for PEPPM Contracts

PEPPM Contracts are awarded in two states according to their unique bid statutes.

- Pennsylvania
- California

PEPPM purchasing is also available in many other states. PEPPM bid Terms and Conditions include language that outlines its intent for PEPPM contracts to be used by PEPPM eligible schools, libraries and agencies in other states at the option of the Awarded Vendor and the school, library or agency's determination that the PEPPM bid process and terms and conditions meet their bid requirements.

In Pennsylvania, the awarding educational agency is Central Susquehanna Intermediate Unit (CSIU). Read down for more information and details.

In California, the awarding educational agency is Kern County Superintendent of Schools. Read down for more information and details.

Other States Can Use PEPPM:
After many years, it was decided that technologies such as the Internet and e-commerce made it possible for us to share this model service with local education agencies (LEAs) and local government agencies in other states. We used a two-fold approach. In a state like California with explicit bid requirements, we partnered with a lead agency (Kern County Superintendent of Schools) to conduct the bids. We used our bid expertise, resources and infrastructure to conduct the bids while Kern County developed their unique specifications and made the awards.

For other states where piggybacking another state's contracts is permitted, we asked our awarded vendors if they were willing to extend their PEPPM bid prices to agencies in those states. The product lines the Awarded Vendor agreed to extend their PEPPM bid prices are listed on the PEPPM website specific to each state.

For states where piggybacking other states' bids is permitted, it is up to each agency to determine whether they can piggyback the PEPPM contracts and whether the prices available are a good value. PEPPM is willing to provide any documentation or answer and questions to help an agency to determine that its procedures meet their standards.

In addition, because PEPPM Terms and Conditions make it optional for the Awarded Vendor to extend its PEPPM bid pricing to other states, you will note that not all product line awards listed for Pennsylvania or California are listed for your state. If a product line is listed for your state, then you can be assured that the Awarded Vendor competed for and won in a sealed bid process in accordance with Pennsylvania's or California's bid statutes and has agreed to sell to schools in your state at or below the posted bid discounted pricing for Pennsylvania or California.

Go to www.peppm.org and select your state from the pull down menu at the top, on your states' page, review all awarded product lines shown. Find the specific product line you are seeking and determine the contact person and information from the Vendor Contacts and Ordering Instructions link. Call or write to the contact person identifying your school or agency, indicate your desire to purchase the specific items through the PEPPM program and ask for a written quote with "As per PEPPM YYYY" (e.g. "As per PEPPM 2015") on it and fax with your purchase order to our toll free PEPPM number (800-636-3779). If they will not, look for an alternative brand that may have been awarded and contact them.

Please note that our bid procedures require that all orders be faxed to our 800 number for review, archiving and then submission to the appropriate vendor. This all happens in a matter of one to two hours. After that, the vendor ships the product(s), bills the agency for the product(s) and the agency pays the vendor.

There is no cost to the agency for using the PEPPM program. The vendor price posted/quoted is the price paid except where the order total is less than $500. In those cases, the vendor may charge shipping.

Who are the eligible Pennsylvania purchasers?	Eligible Pennsylvania purchasers include: • public school districts • area vocational technical schools (AVTS units) • intermediate units • state approved private schools • public libraries • non-public schools • state approved charter schools • community colleges • colleges and universities with the Awarded Vendor's approval and where permissible by statute or regulation • local, county and municipal governments, authorities and other non-profit agencies with the Vendor's approval and where permissible by statute or regulation
What is the Awarding Institution Information for Pennsylvania?	**Awarding Institution: Central Susquehanna Intermediate Unit** **Central Susquehanna Intermediate Unit** 90 Lawton Lane Milton, PA 17847 **PEPPM Bid Process and Award Details** Dates and places of publication of notice inviting bids and award dates can be found at www.peppm.org/pa/awardinfo.htm.
Who are the eligible California purchasers?	Eligible California purchasers include, but are not limited to: • 1,056 public school districts • charter schools • county offices of education • joint powers authorities • community colleges • special districts

What is the Awarding Institution Information for California?	**Awarding Institution: Kern County Superintendent of Schools** **Kern County Superintendent of Schools** 1300 17th Street Bakersfield, CA 93301 **PEPPM Bid Process and Award Details** Dates and places of publication of notice inviting bids and award dates can be found at www.peppm.org/ca/awardinfo.htm.
Can other types of agencies participate (e.g., county governments) in my state?	Although PEPPM is bidding primarily on behalf of educational agencies as listed above, it is the program's intent to extend, where feasible, the bid protections and price discounts to governments, municipalities, related county/municipal authorities and other non-profit organizations. PEPPM and the Agencies in no way want to compromise best pricing offered to school districts and education institutions. However, if state law allows, and if the vendor is willing to sell the awarded items at the same prices and/or discounts as they do for education agencies, and in accordance with the contractual Terms and Conditions to: • Government agencies • Local municipalities • Related county, municipal authorities, special districts and other non-profit organizations • California water districts then they have the opportunity to do so. All such orders must be submitted by the buyer using the same PEPPM procedures as educational agencies to qualify.

PEPPM Catalog Bid Awards

In addition to all its Product Line awards, PEPPM has expanded the number of catalog bid contracts which offer buyers more than 1000 additional bid protected technology related brands in the areas of:

- Audio Visual Products
- General Hardware and Software
- Refurbished Computer Systems and Parts
- Remanufactured Laser Toner and Ink Cartridges

PEPPM has conducted and awarded catalog bids in an effort to provide buyer access to a broad spectrum of products that may be purchased over the course of a year from a single vendor and/or on a single purchase order.

These bids include technology products within specific categories usually sold through online and paper based catalogs. The Vendor's electronic storefront allows buyers to see more complete product descriptions and/or graphic illustrations of products with up-to-date PEPPM discounted pricing.

Please note that PEPPM Catalog awards allow for the same product lines to be listed in more than one vendor's catalog. Buyers may find that product prices listed on more than one catalog may slightly vary. We urge you to shop for the "best deal" among the various PEPPM Online Catalog Stores. Many of these awards show significant discounts. All of these awards were made using a competitive sealed bid process according to Pennsylvania state bid statutes.

With all PEPPM contracts – whether a product line or catalog award – you enjoy complete bid protection backed by PEPPM's protective terms and conditions. You can avoid the time and expense of bidding yourself, and our awarded vendors promise to give you the lowest prices they will offer in your state.

PEPPM Catalog Awarded Categories are:

Audio Visual Products

General Hardware and Software

Refurbished Computer Systems and Parts

Remanufactured Laser Toner and Ink Cartridges

Some of the PEPPM awarded products in the various catalog categories may be eligible for the new round of E-rate funding but have not been covered by a state submitted Form 470. That means that these awards satisfy the Pennsylvania state statutes for competitive bidding but do not satisfy the SLD requirement of filing a Form 470, 28 days prior to the contract awards. E-rate buyers can submit their own 470 for equipment they want to buy and then purchase from the PEPPM Catalog contracts to satisfy the Pennsylvania bid statutes.

Go to www.peppm.org to link to the various online PEPPM stores that have been established. Select the General Information link under the Catalog Bids header in the left frame to access information about the catalog bids and/or links to the specific online PEPPM stores for the different catalog category awards. Or, select the desired catalog category link listed below the General Information link.

Once at the store, you will be able to shop across many product lines by filling your shopping cart with your selections. When you are done shopping, you will be able to print a real-time PEPPM quote for all of the products you chose. Attach that quote to your purchase order and fax it to PEPPM (800-636-3779) as usual to make your PEPPM bid protected purchase.

Section 2: Placing a PEPPM Order

Topic 2.1 PEPPM Order Process Overview

Overview

The PEPPM order process has three main steps:

1. Product and price research (3 options)
2. Processing the PO per PEPPM instructions
3. Vendor receives the PO

Diagram 2.1.1 illustrates the three main steps and provides detail of the process. The sections in this topic will provide the details behind the entire process.

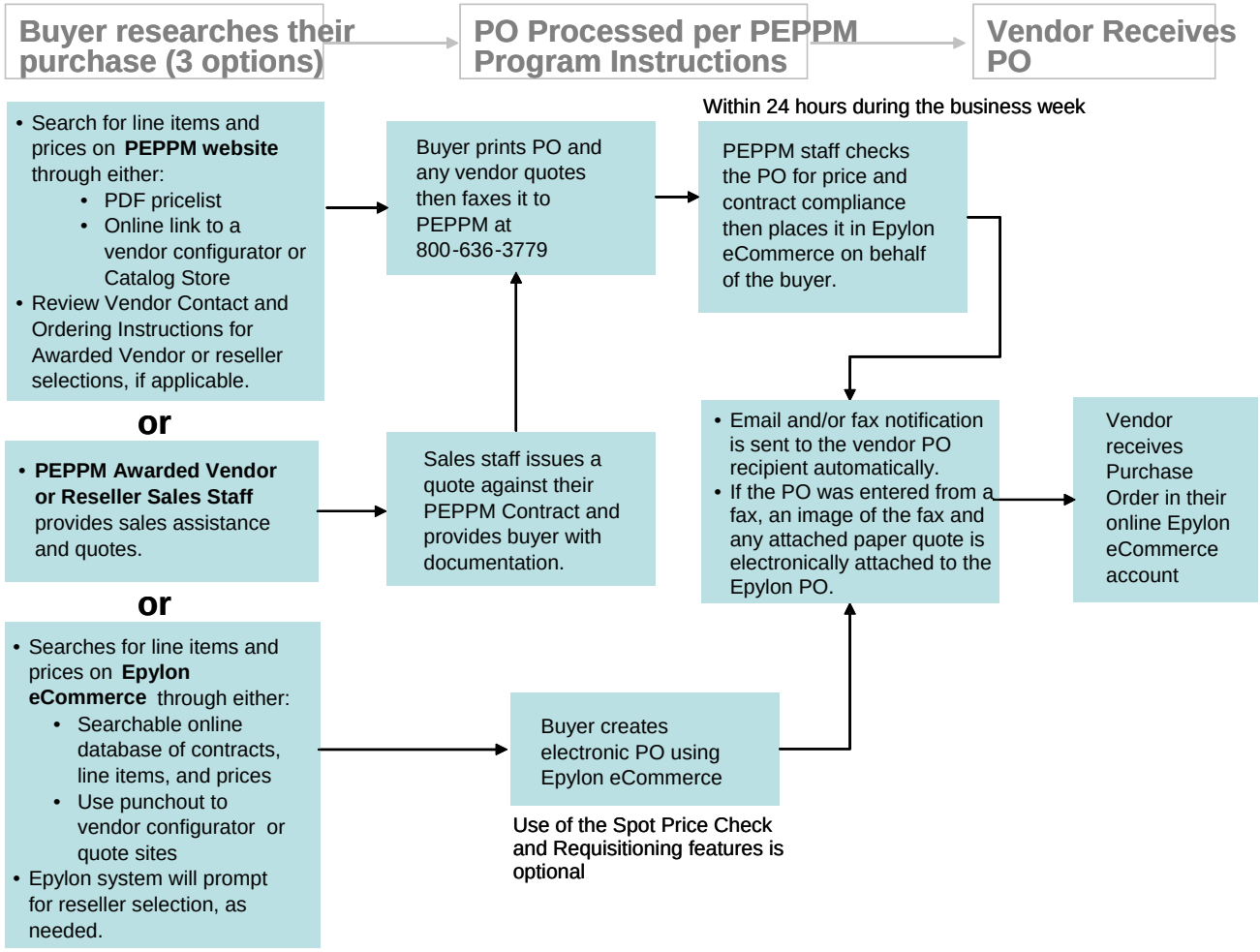


Diagram 2.1.1 PEPPM Purchase Order Process

What are the benefits of the PEPPM Order Process?

The PEPPM Order process provides you with the following benefits:

1. **Superior order tracking**. Orders sent online have an electronic "trail" that is easily retraced in case of any "lost" orders.

2. **Electronic archive for bid protection**. Your order is stored with Epylon's eCommerce system which has extensive backup and data protection technology.

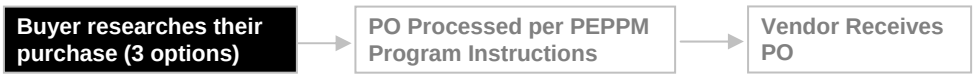
3. **Reporting back to you!** Each quarter, we provide a reporting of all year to date purchases made through the PEPPM Program by your organization. Whether you transmitted an order via fax or directly on eCommerce, they are all in your account and can be displayed on a single report. See Section 3.3 for more information on reporting.

4. **View your orders online**. If you want to view the status of your order at any time, you can login to your Epylon eCommerce account and view the Purchase Orders that the PEPPM Order Processing Staff issued on your behalf.

5. **Vendors asked for more electronic orders**. Many PEPPM vendors are interested in increasing the amount of eCommerce orders they receive. It is more accurate and requires fewer order processing resources on their side.

6. **Easier for you to move toward eCommerce.** We encourage you to use eCommerce for PEPPM ordering. We aspire to make the transition easier by acclimating vendors to the online process, proving that "it works," and offering you the opportunity to view your orders transformed as eCommerce orders.

Step 1: Product and Price Research (3 options)



In addition to working with a vendor's sales staff for assistance and a PEPPM price quote, PEPPM publishes the products and pricing for all contracts in two locations:

PEPPM Website: www.peppm.org
Epylon eCommerce: www.epylon.com

This provides you with three flexible options to research PEPPM products and prices!

Posted prices are listed for a quantity of 1 and are updated by Awarded Vendors on a regular basis.

PEPPM Pricing Policies – take full advantage!
Information on Most Favored Nations Pricing and Volume Discounts is provided later in this guide. Additional important information about pricing is located in Section 2.2 in this Guide.

The PEPPM Website

At www.peppm.org, you will find a great deal of PEPPM Program information. Additionally, up-to-date products and pricelists are posted for your reference.

Several vendors have collaborated with PEPPM to offer links to configurator / quote websites for PEPPM products and pricing.

We hope to add more vendor website links and will keep you posted when they are available.

Epylon eCommerce

See Section 4.2 for screen shots and step-by-step instructions on using eCommerce. We encourage you to consider this excellent alternative to paper purchase processes.

Epylon also offers "punchout" capability for vendors with configuration / quote websites. Currently, Epylon offers this capability to the following PEPPM vendors:

- Troxell Communications (Audio Visual Products catalog)

We hope to add more vendor website links and will keep you posted when they are available.

Step 2: Processing the PO per PEPPM Instructions

PEPPM requires that you submit your PEPPM purchase order one of two ways:

1. Fax the Purchase Order (and any supporting quotes) to PEPPM at **800-636-3779**.
2. Use Epylon eCommerce to issue the order. (See Section 4.2)

TIP! PEPPM's website is an excellent resource for vendor contact information and ordering instructions that are specific to each Awarded Product Line. Look for specifics such as sales representative information, reseller listings, and other company information.

To locate the Vendor Contacts and Ordering Instructions, follow these steps:

1. Go to www.peppm.org
2. Click on Pennsylvania, California or select your state from the pull-down menu
3. Using the alphabetical listing, select the Product Line that you are purchasing
4. On the Product Line page, there is a link to Vendor Contacts and Ordering Instructions
5. Clicking on the link opens a PDF document with Vendor specific contact and ordering information

E-rate Orders

E-rate orders should only be sent through PEPPM when the actual order is placed. Do not submit orders to PEPPM that are dependent on SLD approval of your application.

Buyers taking advantage of E-rate discounts must indicate this on the PO, by using the words "E-rate Purchase Order" whether it is a faxed PO or an electronic Epylon PO, so vendors can act on it accordingly.

For more information on using PEPPM Contracts for E-rate, see Section 3.2.

What happens to my PO?

Faxed Orders
Within 24 hours during the business week, the PEPPM Order Processing Staff reviews your order and issues it to the vendor.

The PEPPM Order Processing Staff reviews your order for the following:

- Product and price compliance with current product/price lists. We make sure that your prices are at or BELOW these posted prices.
- Quote documentation and other compliance details. We make sure these items are in place so that your order flows quickly through the vendors' order management.
- Make sure that your quote is identified as a PEPPM quote using "As per PEPPM 2015" (Contract year in YYYY format).

The staff will transform your fax into an Epylon eCommerce order on your behalf. The original fax is attached as an electronic image for the vendors' reference.

Instead of waiting for your quarterly report, you may decide to login to your Epylon account and view your Purchase Order listing. For assistance, contact Epylon Customer Service.

Epylon Customer Service
service@epylon.com
888-211-7438

Epylon eCommerce
In some cases (like ePlus Technology, Inc.), orders flow directly into their order management systems. For faster service and lower order processing costs.

For most vendors, an e-mail and/or fax immediately notifies them that they have a new order. Once they login, they can indicate that they "Accept" the order which is tracked on the PO for the buyer to view.

In all cases, your order is stored for bid protection and future reporting.

24 Hour Service

The PEPPM Staff is committed to a 24-hour turnaround on all orders during the business week with most orders processed in 2-3 hours.

Levels

Occasionally, during the order checking a question will arise. The Staff will contact you immediately, but it may affect your 24 hour timeframe – so we appreciate your prompt responses!

If you are concerned that an order is outside of this 24-hour limit, please let us know.

PEPPM Order Processing Staff
orders@peppm.org
570-523-1155 x8200

Can't I just fax the vendor and PEPPM?

In some past cases, educational agencies have faxed their orders to both the vendor and PEPPM. We ask that you follow our procedure for order submission and not send orders to both places.

The reason for this is twofold:

1. **It slows down your order**. Because vendors are not permitted to accept PEPPM orders directly from buyers (except via Epylon eCommerce) they must fax the order back to PEPPM's 800 fax number (800-636-3779) before processing it.

2. **The possibility for order duplication.** Whenever the order is issued to two places, the potential for duplication exists. Our processes are designed to handle the possibility, but none of the parties involved wants order duplication.

If your order is a RUSH and the 24 hour turnaround does not meet your needs – Please let us know! We can work with you and the vendor to ensure a timely delivery of your order through the proper channels.

We appreciate your assistance and cooperation.

Step 3: Vendor

Buyer researches their purchase (3 options) → PO Processed per PEPPM Program Instructions → **Vendor Receives PO**

Receives PO

After the PEPPM Staff issues the order via Epylon to the vendor, an e-mail and/or fax notification is sent immediately.

Epylon Account
Vendors login to their Epylon account and accept the purchase order. This "Accepted" status is referenced electronically when anyone in the buyers' account reviews that sent order.

The vendor will process the order from that point onward. They will deliver the product(s) to you and then will invoice you directly for the goods or services on your PO. They may contact you for questions or clarifications on your order.

Epylon Purchase Order Information

When they login to Epylon, the Vendor's orders are listed in a Purchase Order Inbox which is similar to an e-mail inbox.

The vendor opens the specific document and can view the following types of information:

- Contact Information for the purchasing agency
- Your PO Number
- The Ship To Address and Contact Name for the purchase
- Line items and prices with a reference to their PEPPM contract
    - If the order was issued from a buyer using Epylon and a Spot Price check – the information is referencable by a hyperlink.
- An electronic image of your original purchase order and any PEPPM quotes faxed to PEPPM.
- PEPPM Order Processing contact information in case of questions.

"Lost" Orders

If you submitted an order through the PEPPM Fax line or via Epylon eCommerce, the order should not be "lost."

So that we can assist you and the vendor, please contact us so we can research the issue. Our system offers many ways to trace your order through our process.

Contact the PEPPM Order Processing Staff or Epylon Customer Service.

PEPPM Order Processing Staff
orders@peppm.org
570-523-1155 x8200

Epylon Customer Service
service@epylon.com
888-211-7438

Cancelled or Changed Orders

If your order is cancelled or changed within the same calendar month you sent it to PEPPM, contact us. We will work with you to reflect the appropriate changes and notify the vendor.

You can certainly work directly with a Vendor on a cancellation or change order. We offer our assistance as a service to assist you with making your a PEPPM transaction successful.

For help with orders,

PEPPM Order Processing Staff
orders@peppm.org
570-523-1155 x8200

Epylon Customer Service
service@epylon.com
888-211-7438

Section 2: Placing a PEPPM Order

Topic 2.2 PEPPM Pricing Facts

Overview

For more than two decades, the PEPPM Program has been a trusted partner to educational agencies.

PEPPM technology bids allow technology buyers and purchasing agents to rely on our expertise in technology bidding. Instead of running a formal sealed bid, you can leverage the results of the PEPPM bid process to focus on making a timely transaction on favorable terms at a competitive price resulting in faster access to technology products for students, teachers and administrators.

A PEPPM contract delivers the following benefits:

- A contractual commitment from vendors to provide "most favored nations" pricing.
- A price structured designed to accommodate the way that technology pricing works:
    - Dynamic product lists and discounted prices
    - Volume discounts
- The ability to compare vendors across the same terms and conditions.
- Favorable terms and conditions for shipping, returns, and warranties.
- Awards made only to top performing technology manufacturers and resellers.

Pricing Strategy

Buyers familiar with PEPPM know that the pricing offered through PEPPM has been through a respected, thorough, and competitive process. The bid is specifically constructed to provide excellent pricing and the flexibility necessary for technology procurement.

Most Favored Nations Pricing
This important stipulation of all PEPPM awards assures the buyer that the same vendor is not selling the same product with similar quantity and terms to another educational agency for a

lower price.

Shipping Is Included!
All PEPPM contracts stipulate that any single order that is $500 or more will have free shipping. Many PEPPM Awarded Vendors waive shipping charges for orders less than $500. If you are comparing prices, be sure to factor this into your decision.

Publicly Available Pricing
PEPPM publicly posts up-to-date line item price information for all PEPPM Awarded Vendors. This gives buyers the unparalled ability to compare vendors across the same contractual terms and conditions.

Volume Matters!
The PEPPM bid is specifically structured to allow buyers and vendors to negotiate discounts based on quantity. Posted prices are for a quantity of one. Discounts can be negotiated for any volume purchases and still be valid PEPPM purchases as long as the quote is identified as a PEPPM quote, according to contract terms and conditions.

To obtain a PEPPM quote:

- Contact the PEPPM Awarded Vendor or a PEPPM authorized reseller for a price quote
- Use Epylon eCommerce Spot Price Check. See Section 4.2 for more information

Technology Price Structures
The nature of technology results in rapidly changing prices and products. To accommodate this, the PEPPM bid requires vendors to adhere to a price discount structure but allows for the addition and removal of line item products from the award.

Price Verification Efforts
- Street Price Checks – PEPPM staff checks wholesale and street prices to verify that PEPPM prices are appropriate and educationally discounted even when they are compliant with bid pricing structure.
- Auditor Review – PEPPM staff verify product prices are within bid price structure. An independent accounting firm is engaged to ensure that awarded vendors are posting and quoting prices in conformance with their bids.

Price Discount Structure	Pricing can change throughout the term of a PEPPM contract so long as the prices are within the pricing structure that was originally submitted on the quote sheet of winning bid proposal. **Note that prices may always be discounted lower than the posted PEPPM prices.**
Adding New Products	With technology products, new products are continuously introduced. The PEPPM Program allows for this flexibility. New products added must be at or lower than the discount that was originally bid and be easily identified as meeting the description of the products that were bid. Pricing for new products offered at less favorable discounts or higher markups than was originally bid will not be permitted. A product line described for the bid as printers cannot have computer models added even though the same company manufactures them.
Bid Protection for Leasing	Lease arrangements can be made through the PEPPM Program. Each Awarded Vendor is required to submit a file detailing lease terms and conditions arrangements available to educational agencies through their firm. This file and any updates during the contract term will be available online at www.peppm.org.

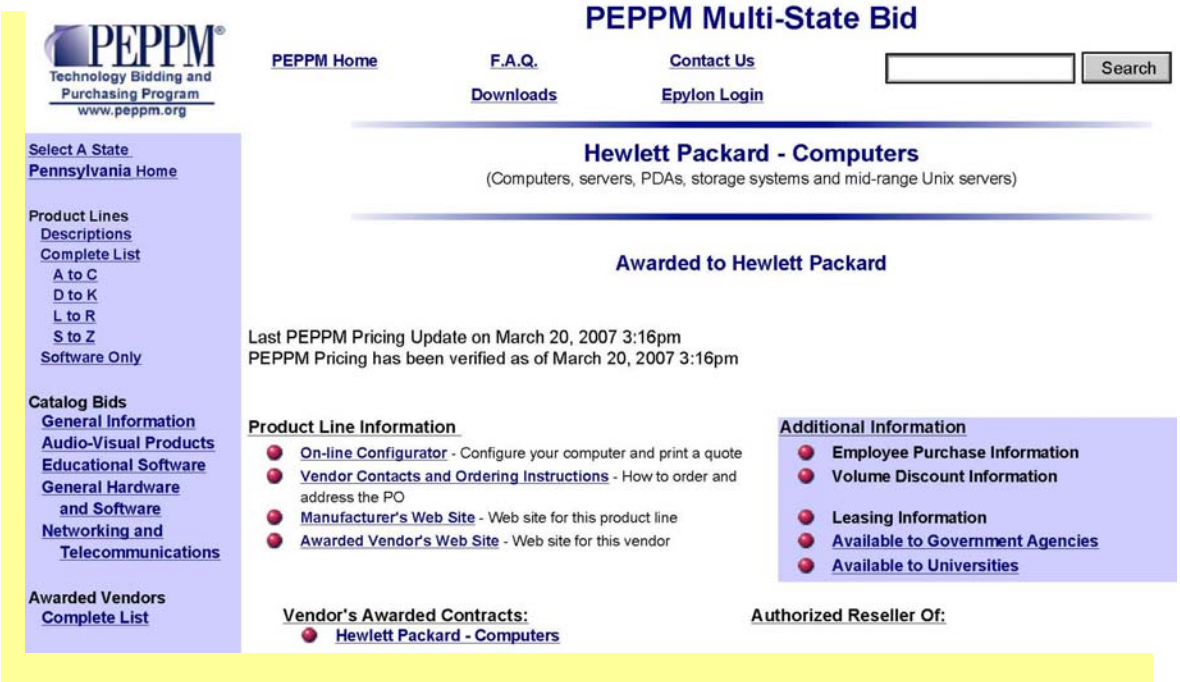


Diagram 2.3.1 For lease information, view the Product Line page on PEPPM.org.

Lease Support Documentation

To receive PEPPM bid protection on a lease transaction, the vendor must provide your organization with the following documentation:

- A quote for the lease indicating "As per PEPPM YYYY"
- The equipment base price of the lease was derived from using the discounted PEPPM bid prices

Your organization will then submit an order to PEPPM for the lease and include:

- Copies of all leasing documents and any associated PEPPM Quotes
- A Purchase Order for the lease, or a cover memo from your school outlining your intention to lease

Leasing Questions?

Should you have questions about utilizing a PEPPM contract for a lease, contact Dave Manney at PEPPM.

Dave Manney
dmanney@peppm.org
570-523-1155 x2174

Section 3: Bid Protection Services and Reports

Topic 3.1 Bid Protection Services

Bid Protection

In addition to competitive pricing, many educational agency buyers use a PEPPM contract specifically because of the bid protection that a competitively bid contract provides.

With other contracts your organization may be responsible for proper record keeping and compliance to meet audit requests many years forward.

PEPPM provides key value to the education community and vendors by archiving information and supporting audit requests. Our experienced Staff regularly responds to information requests by auditors and education agencies.

We know of no PEPPM bid protected purchase that has ever been cited in an audit! PEPPM bid protection applies only to orders that are processed through PEPPM procedures.

E-rate Purchases

See Section 3.2 for details on using PEPPM contracts for E-rate.

It is especially important that you fax final E-rate orders through the PEPPM order fax line at 800-636-3779. The order will be verified for accuracy and archived for SLD and state audit support.

If PEPPM has not received your order, we will be unable to verify it as a PEPPM order. Sending your orders directly to vendors could cause confusion, and result in shipment delays, a double-shipment and/or SLD and state audit concerns for not following the prescribed procedures.

Fax it… Don't mail it… to PEPPM at 800-636-3779. No other statewide bid program provides audit support like PEPPM.

How we process Purchase Orders

When your PO fax arrives at our offices, our order processing team reviews your order to ensure that it complies with the PEPPM Contract. Items we review for each PO include:

- Did you pay for shipping? (Orders $500 or more have standard shipping included)
- Is the price at or below the currently posted price? (Sometimes we save you $$ by noticing the prices have been lowered)
- Did you note "As per PEPPM YYYY" on your PO?
- Are all supporting quotes attached and identified "As per PEPPM YYYY"?
- Is the Vendor/Reseller authorized to sell those products and/or services under PEPPM?
- Is the Purchase Order and any quotes readable?

LEAs will be contacted if any irregularities are determined. The LEA will determine how they want to correct the order. Once the order is determined to be correct, the PO is issued to the designated vendor.

After the PO is issued, it is maintained in our archives. Specifically, PEPPM maintains an electronic archive of:

- All purchase orders
- PEPPM price lists for all product lines for all dates

Upon request, we are ready to provide a copy of your purchase order plus documentation of the contract prices available on the day of your purchase.

Contact

For PEPPM and Technical Support questions and requests, please contact Dave Manney.

Dave Manney
dmanney@peppm.org
570-523-1155 x2174

Section 3: Bid Protection Services and Reports

Topic 3.2	Using PEPPM for E-rate Purchases

Overview

PEPPM contracts can be used for E-rate purchases you are planning. This topic outlines where to find key pieces of information to take advantage of this valuable program and what PEPPM has done on your behalf.

Spin Numbers

Vendor Spin Numbers are posted on the PEPPM Website at www.peppm.org.

Issuing the Purchase Order

When do I issue the E-rate PO?

My purchase IS contingent on E-rate funding.
If your purchase is contingent on E-rate funding, a purchase order should be faxed to PEPPM after your funding commitment decision has been made by the SLD, or after July 1st, whichever is later.

My purchase is NOT contingent on E-rate funding.
If you would like to purchase equipment regardless of E-rate approval, you should submit your purchase order to PEPPM anytime after July 1st. When your E-rate approval is received later, you can then simply seek reimbursement using a BEAR form.

Amount of the Purchase Order
The purchase order should be for the full amount of the equipment, not for the E-rate non-discounted amount.

- The PO should clearly state that this is an E-rate item
- Include the Funding Request Number (FRN) pertaining to that piece of equipment.
- If the PO is issued after a funding commitment decision is issued by the SLD, the PO should specifically state whether you would like to receive a discounted invoice (where you would just pay the non-discounted portion and the vendor would seek reimbursement from the SLD).

Orders will be processed the same as any other PEPPM order. The only real difference is the discount the buyer is entitled to through the E-rate program.

The order will be verified for accuracy and archived for SLD and state audit support.

Bid Protection on E-rate Orders

If using PEPPM as a Master State Contract for your E-rate purchase, the SLD advises that you must follow all the Terms and Conditions of the Master State Contract.

If PEPPM has not received your order, we will be unable to verify it as a PEPPM order. Sending your orders directly to vendors could cause confusion, and result in shipment delays, a double-shipment and/or SLD and state audit concerns for not following the prescribed procedures.

Fax it… Don't mail it… to PEPPM at 800-636-3779. No other statewide bid program provides audit support like PEPPM.

For more information on PEPPM's bid protection services, see Section 3.1.

For Pennsylvania Educational Agencies only

For **Pennsylvania educational agencies**, we can offer this additional information.

As you know, the only way an E-rate applicant can submit a Form 471 without submitting a 470 is when someone else submits the 470 on your behalf. Such is the situation with the state's PEPPM contract for internal connections and maintenance. As in previous years, the PA Department of Education has filed a Form 470 simultaneously with the official state procurement process to competitively bid the PEPPM contracts. Schools (both public and nonpublic) and libraries that would like to purchase and take receipt of an E-rate eligible item from PEPPM on or after July 1st, may now simply file one form, the Form 471.

For more current information to help you complete your Form 471 application, please go to www.peppm.org/pa/erate.

Contact for Questions	You can contact PEPPM with specific questions as it relates to using PEPPM contracts for E-rate purchases. For E-rate assistance, contact the Central Susquehanna Intermediate Unit at the following number. **E-rate Questions?** 570-523-1155 x2144.

Section 3: Bid Protection Services and Reports

Topic 3.3 Reports

Overview

We appreciate and value your PEPPM participation.

To assist you with purchasing management, vendor management and recordkeeping, we provide reports each quarter to organizations with 10 or more purchases through PEPPM.

Get your report!

We e-mail reports each quarter. To receive a report, at least one member of your organization needs to be on our mailing list.

Contact Epylon to be on their reports list.

Epylon Customer Service
service@epylon.com
888-211-7438

Schedule

After the close of each calendar quarter, Epylon will e-mail year-to-date purchase reports to organizations with 10 or more purchases through PEPPM.

Report Data Range	E-mail Delivery Date
January – March	Mid-April
January – June	Mid-July
January – September	Mid-October
January – December	Mid-January

3.3.1 Report Schedule

Purchase Order Report

The Purchase Order Report subtotals your purchases from each vendor and provides an overall total of your year to date purchases through PEPPM. Each purchase order is summarized as a single line item on the report. See the following example of a quarterly report.

Sample PEPPM Purchase Order Report for 2005

epylon imagine more

PEPPM Technology Bidding and Purchasing Program www.peppm.org

(See last page for Report Field Definitions)

Your School District Name

CDW Government, Inc.

PO Date	PO Number	Epylon ID	Extended Price	Tax	Shipping	Total	PO Title	Vendor
02/20/2005	03104575	526548	$398.69	$0.00	$39.00	$437.69	From LIST - PO#03104575-Olympu	CDW Government, Inc.
Subtotals	1		$398.69	$39.00	$0.00	$437.69		

Centre Business Products, Inc.

PO Date	PO Number	Epylon ID	Extended Price	Tax	Shipping	Total	PO Title	Vendor
03/20/2005	03105186	527653	$628.00	$0.00	$0.00	$628.00	From LIST - PO#03105186-Infocus	Centre Business Products, Inc.
03/21/2005	03105092	527715	$842.00	$0.00	$0.00	$842.00	From LIST - PO#03105092-Infocus	Centre Business Products, Inc.
Subtotals	2		$1,470.00	$0.00	$0.00	$1,470.00		

Tuesday, March 01, 2005 *Page 1 of 4* *Epylon Corporation*

Diagram 3.3.1 Sample Purchase Order Report, page 1 of 4.

Sample PEPPM Purchase Order Report for 2005

epylon imagine more

PEPPM Technology Bidding and Purchasing Program www.peppm.org

(See last page for Report Field Definitions)

Your School District Name

ePlus Technology of PA, Inc.

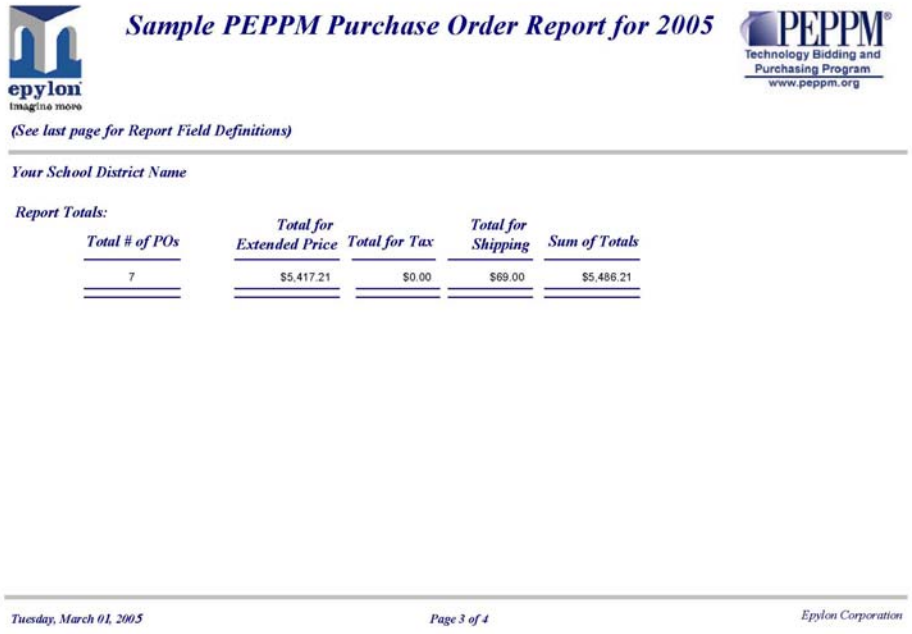
PO Date	PO Number	Epylon ID	Extended Price	Tax	Shipping	Total	PO Title	Vendor
03/11/2005	03104901	527275	$205.12	$0.00	$15.00	$220.12	From LIST - PO#03104901-HP - ePl	ePlus Technology of PA, Inc.
03/13/2005	03104964	527356	$2,161.04	$0.00	$0.00	$2,161.04	From LIST - PO#03104964-HP - ePl	ePlus Technology of PA, Inc.
03/17/2005	03105108	527457	$340.36	$0.00	$15.00	$355.36	From LIST - PO#03105108-HP - ePl	ePlus Technology of PA, Inc.
Subtotals	3		$2,706.52	$30.00	$0.00	$2,736.52		

K12Discount.com

PO Date	PO Number	Epylon ID	Extended Price	Tax	Shipping	Total	PO Title	Vendor
03/18/2005	03105092	527491	$842.00	$0.00	$0.00	$842.00	From LIST - PO#03105092-Infocus	K12Discount.com
Subtotals	1		$842.00	$0.00	$0.00	$842.00		

Tuesday, March 01, 2005 *Page 2 of 4* *Epylon Corporation*

Diagram 3.3.2 Sample Purchase Order Report, page 2 of 4.



Sample PEPPM Purchase Order Report for 2005

epylon imagine more

PEPPM Technology Bidding and Purchasing Program www.peppm.org

(See last page for Report Field Definitions)

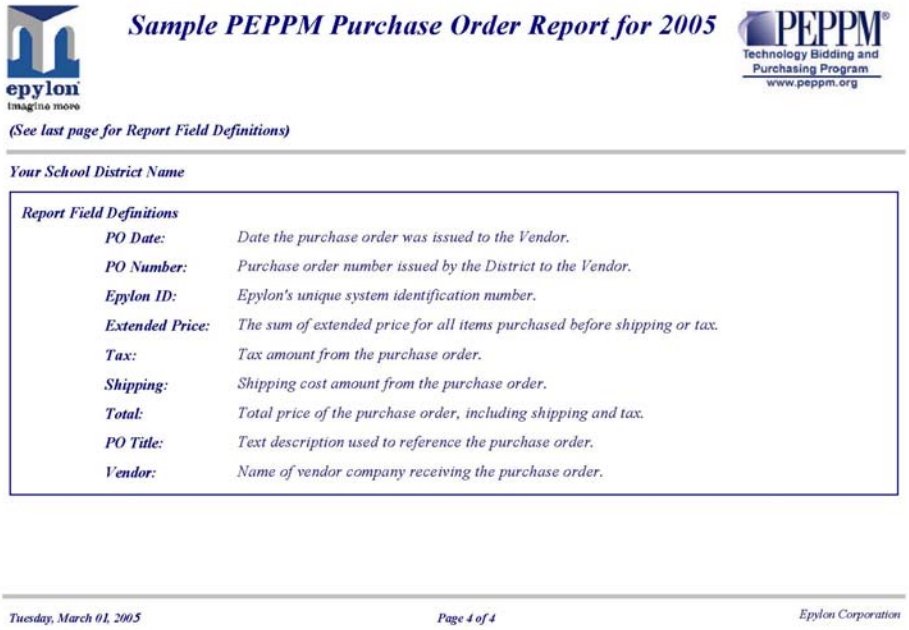
Your School District Name

Report Totals:

Total # of POs	Total for Extended Price	Total for Tax	Total for Shipping	Sum of Totals
7	$5,417.21	$0.00	$69.00	$5,486.21

Tuesday, March 01, 2005 *Page 3 of 4* *Epylon Corporation*

Diagram 3.3.3 Sample Purchase Order Report, page 3 of 4.



Sample PEPPM Purchase Order Report for 2005

epylon imagine more

PEPPM Technology Bidding and Purchasing Program www.peppm.org

(See last page for Report Field Definitions)

Your School District Name

Report Field Definitions

PO Date:	*Date the purchase order was issued to the Vendor.*
PO Number:	*Purchase order number issued by the District to the Vendor.*
Epylon ID:	*Epylon's unique system identification number.*
Extended Price:	*The sum of extended price for all items purchased before shipping or tax.*
Tax:	*Tax amount from the purchase order.*
Shipping:	*Shipping cost amount from the purchase order.*
Total:	*Total price of the purchase order, including shipping and tax.*
PO Title:	*Text description used to reference the purchase order.*
Vendor:	*Name of vendor company receiving the purchase order.*

Tuesday, March 01, 2005 *Page 4 of 4* *Epylon Corporation*

Diagram 3.3.4 Sample Purchase Order Report, page 4 of 4.

Section 4: Epylon eCommerce

Topic 4.1 Getting Started

Overview

In 2000, PEPPM partnered with Epylon Corporation to deliver, among other PEPPM Program elements, eCommerce.

As part of this alliance agreement, Pennsylvania educational agencies have free access to Epylon's eCommerce solution. The only costs are for financial system integration. Educational agencies in other states pay a small annual subscription fee for access.

Epylon's eCommerce system is accessed over the Internet where the educational agency has an account. Within the account, the organization can have one or more users. Each user can be assigned different levels of purchasing and approval authority.

Viewing your Epylon Account Activity

As described in Section 2.1 on the PEPPM Order Process, most educational agencies that make purchases through Epylon already have an active account.

"Touring" your own account activity and Purchase Order history is a good way to see what eCommerce is already doing for your organization.

To gain access to your existing account, contact Epylon Customer Service.

Epylon Customer Service
service@epylon.com
888-211-7438

Reasons to Consider Epylon eCommerce

Epylon eCommerce is developed specifically for educational agencies. Epylon eCommerce was first launched in 2000 and there are many educational agencies using it nationwide. For white papers and references, contact Ted Witt.

Ted Witt
tedwitt@epylon.com
916-826-2039

Epylon is designed to help educational agencies manage their contracts, get quotes, and requisition approvals. Integration with financial systems is available for several major fund accounting packages, including CSIU Fund Accounting.

The table below outlines some of the many reasons to consider Epylon eCommerce.

More About Epylon eCommerce

eCommerce Offering	What it Means to You	Benefits
Contract Management	• Store summary and line item contract information • Easy access to large sets of contracts like PEPPM Contracts • Online line item and contract searches for product and price information • List functionality allows users to create "mini-catalogs" for repeat purchases	• Greater compliance with best contracts • Easy for end users to create requisitions from contracts • Up-to-date pricing always available
Vendor Website Integration	• For vendors with eCommerce capability, Epylon can integrate with a Punchout site displaying contract prices and easy shopping o Current examples include Troxell Communications • Vendors also have the option to receive their purchase orders directly into their order management systems (eOrder)	• Easy contract shopping for end users • Greater compliance with best contracts • Easy for end users to create requisitions from contracts • Up-to-date pricing always available
Quote Capability	• eQuote allows a buyer to request price information from multiple vendors (not necessarily PEPPM) • Spot Price Check allows buyers to request a volume price check against a contract items (like PEPPM items.)	• Electronic audit trail of price research and savings
PO Approval Management	• Flexible approval routing and rules can be implemented to approve purchases	• Faster approvals on purchases • Electronic audit trail of approvals
Financial System	• "Touch points" with the financial system to provide Requisition	• Improved financial controls for

	Integration	Numbers, PO Numbers, and validate fund balances	purchasing • Eliminates any duplicate entry between Epylon and the accounting system • Allows site-based requisitioning using a web-based system without replacement of financial system software
	User Management	• Entire account can be managed by an Administrative user (non-technical) at the educational agency • Levels of privilege make site-based implementations possible.	• Easy to manage implementations
	Low cost of ownership	• Entire solution is hosted and operated by Epylon. • Annual subscription fees are very minimal (and free to PA agencies) • Integration costs are minimal once the software company has integrated once.	• No hardware or software to buy • Minimal staff technical training • Low impact on IT staff • Agencies using QSS and CSIU Fund Accounting achieve very low cost integrations
	Epylon Services	• Email and phone access to experienced customer service staff • Training services available • Contract and vendor negotiation services available	• Less support burden for internal IT staff • Gain a partner in procurement best practices, not just a software solution

Getting Started with eCommerce

If you are interested in knowing more about eCommerce, we recommend getting in touch with the PEPPM Team at Epylon who can help you begin your account set-up.

Our team will assist you with the first step of an eCommerce implementation – setting up your account and users. Once this is complete, you can begin making purchases through Epylon. Basic phone training is available.

The set-up of your account will involve the following basic information:

1. User Information (e.g., Name, Address, Phone, and Fax)
2. Ship To Addresses and Contact Names for your organization.
3. Approval levels for your end users. (e.g., the user can create a requisition but not make a purchase, the user can perform all functions and manage the account information)

Also, from this point forward, they will work with you on any site based rollouts or financial system integrations you wish to pursue.

Epylon Contacts:

Suzanne Barchi
sbarchi@epylon.com
209-992-6181

Ted Witt
tedwitt@epylon.com
916-826-2039

Section 4: Epylon eCommerce

Topic 4.2 Using Epylon eCommerce to Place an Order

Overview

Using Epylon to make a PEPPM purchase requires that your Epylon account is established (a short process) and that you have some basic training/orientation to the Epylon site.

Some users may find that the information in this document provides sufficient direction for them while other individuals may want more training. To request some phone training and/or documentation on using Epylon, please contact:

Epylon Customer Service
service@epylon.com
888-211-7438

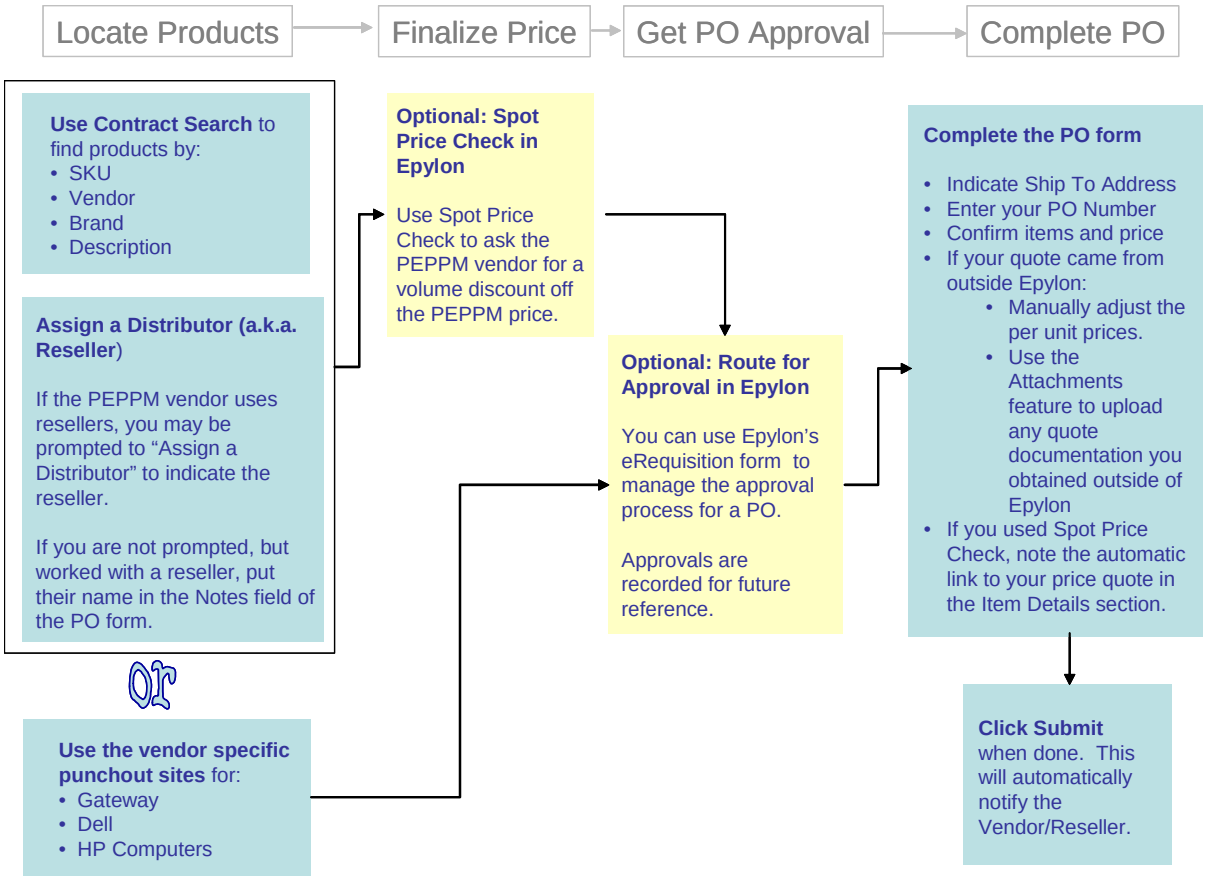


Diagram 4.2.1 Epylon eCommerce PEPPM Purchasing Process

Locate Products

Locate Products → Finalize Price → Get PO Approval → Complete PO

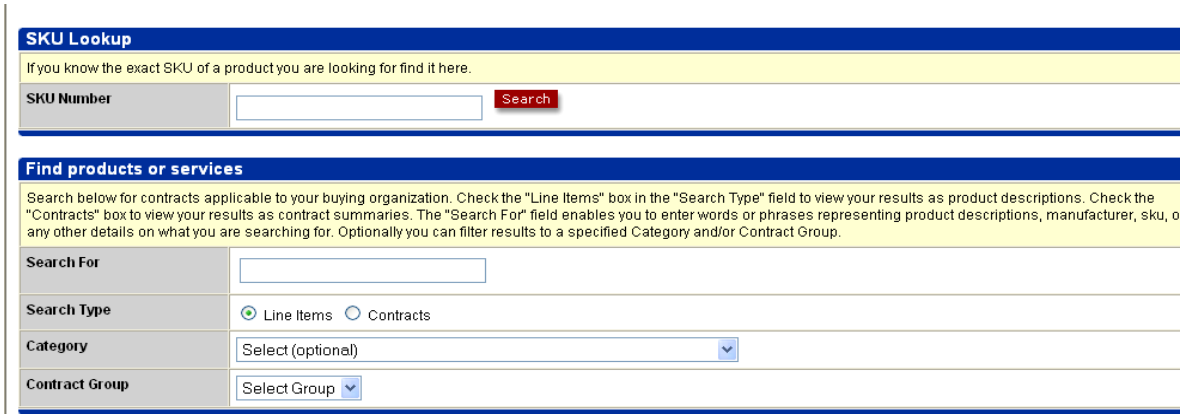
As shown in Diagram 4.2.1, you have two ways to locate PEPPM products and pricing on Epylon. Using Epylon, you will automatically see vendors, products and pricing appropriate to your state.

1. **Contract Search**. Use Epylon's contract search to locate line items and their price.
2. **Vendor site Punchout**. Link to their PEPPM websites for product configuration and PEPPM pricing.

1. Contract Search

Epylon's contract database contains all PEPPM contracts and line items. To search the database, you will use the search page to provide some search criteria.

1. Click on the Contracts tab.
2. Decide if you want to search for line items or the contract. (If you locate a contract, you can "jump in" to the line items from its summary page.)
3. Enter your other search criteria:
    1. To search by Awarded Vendor, use the Select Supplier button to select the vendor.
    2. To search by item description, enter key words in the Item Description field.
    3. To search by SKU, enter the SKU into the SKU/Part Number field.
4. Click the Search button in the lower right hand corner to initiate your search. Follow the graphical presentation for more.



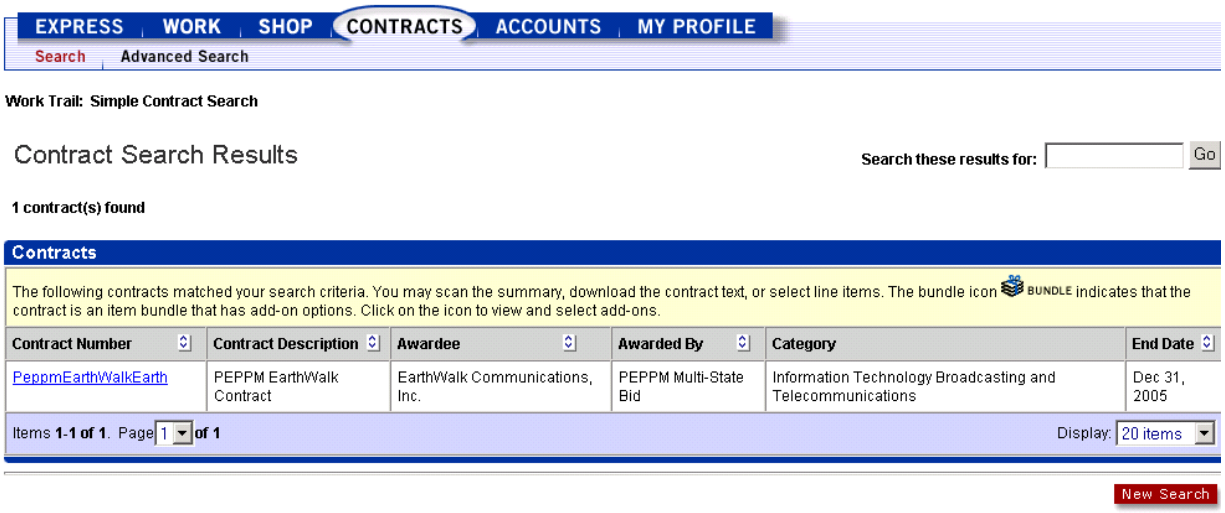


Diagram 4.2.3 Search results. Searched for Contracts (not line items) and used the Supplier Selector to search for EarthWalk contracts. Their one PEPPM contract showed up in the result set.

From the search result above, click on the blue hyperlink under the Contract number. This takes you to a summary page. Clicking "Shop These Line Items" takes you to a listing of the 43 items in the EarthWalk contract.

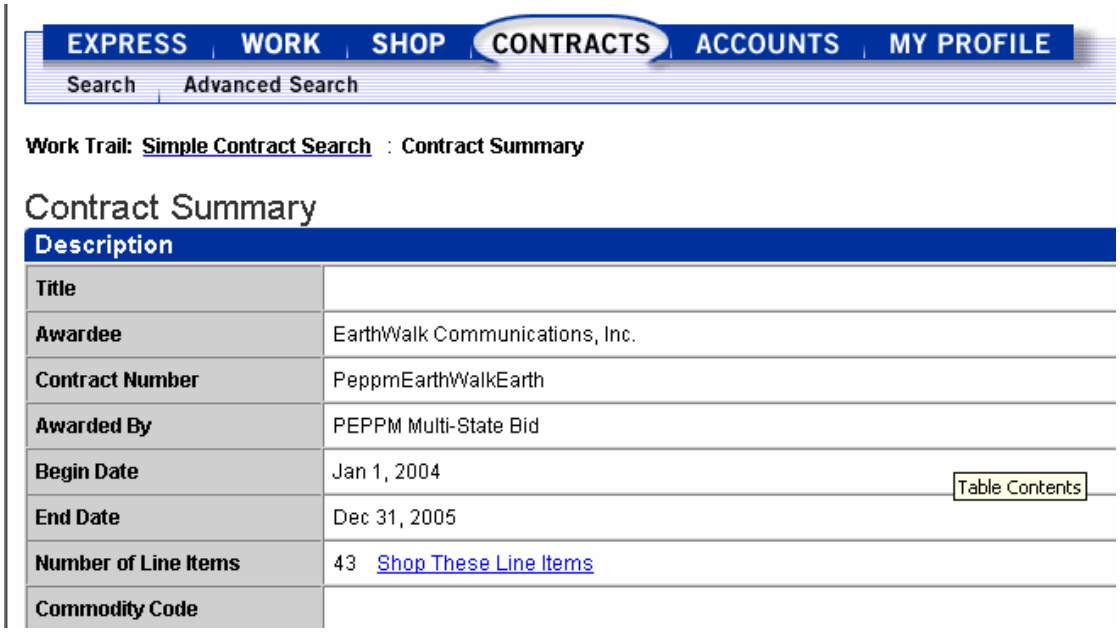


Diagram 4.2.4 Contract Summary Page. Click on the blue hyperlink to view the line items and prices.

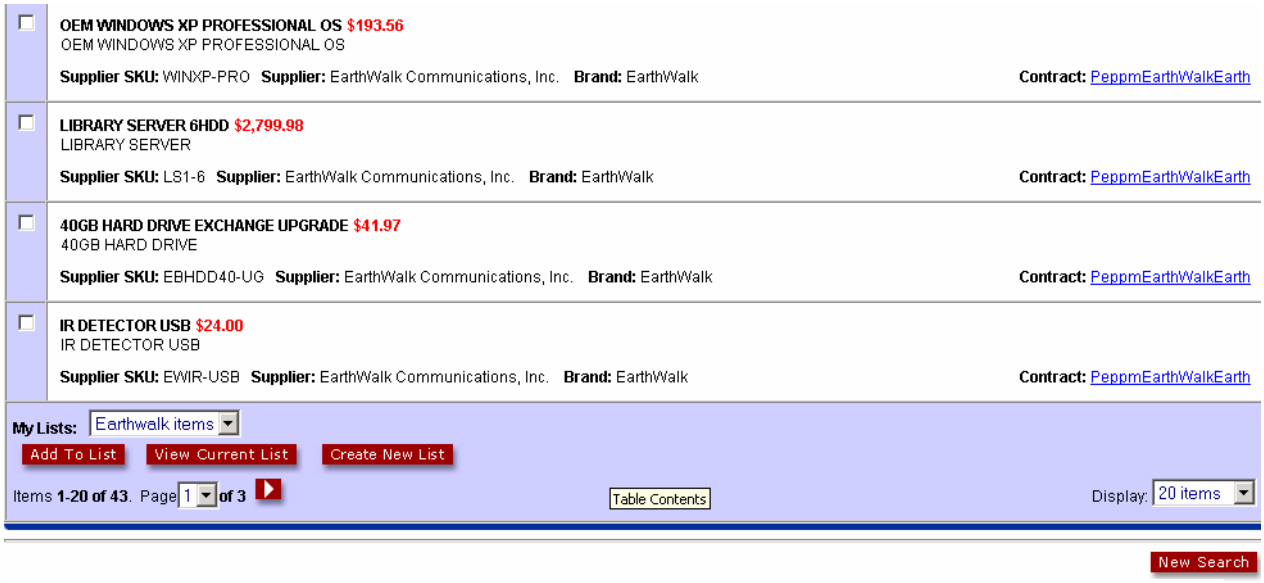


Diagram 4.2.5 Item view of contract.

To select an item from a contract, you must first have a List created. Use the buttons seen on Diagram 4.2.5 to create a List if you don't already have one. Lists are used to compile similar items, but Lists can contain more than one vendor's products.

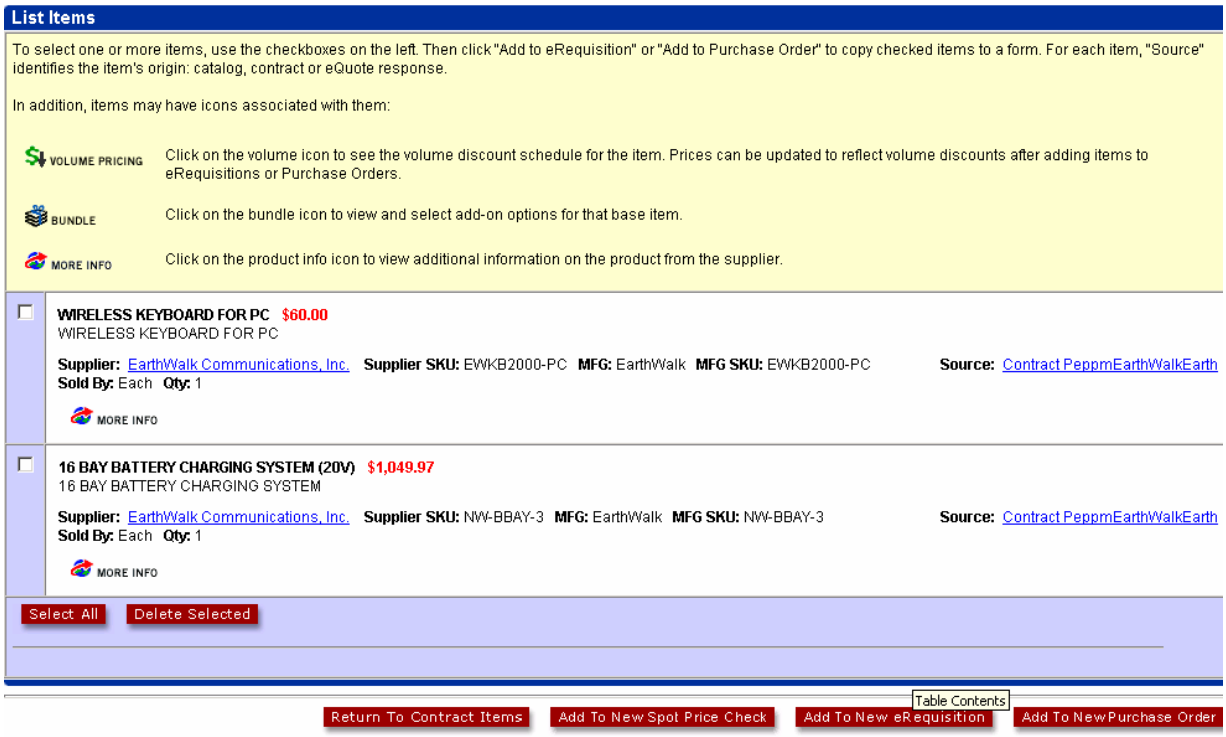


Diagram 4.2.6 List view of items from a contract.

2: Punchout to a Vendor Site

Locate Products → Finalize Price → Get PO Approval → Complete PO

The second option to locate products and prices is to use vendor punchout sites.

For the vendors that have implemented a punchout site, you will find their PEPPM contract information by linking to their punchout site from Epylon. Once you locate the items you wish to purchase, you will bring them back to Epylon within a "List" before making your purchase.

Use the following steps to configure PEPPM products and prices for:

- Troxell Communications
- More coming soon!

1. Login to Epylon eCommerce at www.epylon.com
2. From the landing page, click on the blue button "Shop By Suppliers."
3. Scroll to the section of the page called "Shop these Sites"
4. From the drop down list (Diagram 4.2.7), select a PEPPM supplier (e.g., Dell)
    - If you are interested in having access to the other sites you see listed, contact Ted Witt at Epylon.

      Ted Witt
      tedwitt@epylon.com
      916-826-2039

Diagram 4.2.7

5. Once you are on the vendor's website, you will be shopping from PEPPM products and prices. As you shop, place your items in the Shopping Cart – this is how you will construct your list of items to bring back into Epylon.
6. Done shopping? Go to your Shopping Cart and complete the Checkout process. Your shopping is entirely anonymous and no purchase

commitment is made when you Checkout from an Epylon punchout website.

- Troxell Communications calls the process "Checkout"

7. Once you click to confirm that you are completing the Checkout process on the vendor website, your Shopping Cart will be transmitted back into your Epylon account. A message will display on your browser (Diagram 4.2.8). Click the Save Cart button to return to Epylon.

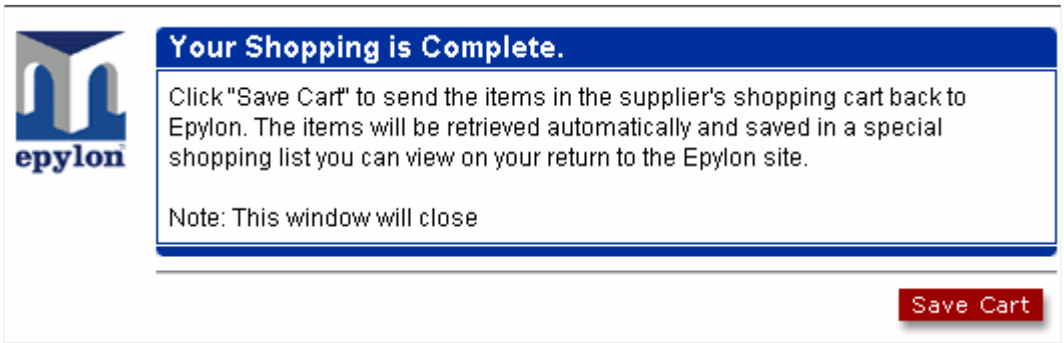


Diagram 4.2.8 The message displayed when you end a punchout session and return to Epylon

8. The vendor website and the Save Cart messages will close. You will be back in Epylon on a List page that contains your Shopping List of items from the vendor website.
   - Edit the default List description by clicking the Edit List Properties button (Diagram 4.2.9)

Description

Name	Description	Date Created	Last Modified	# of Items	Shared
Dell Marketing L.P. - 01/30/2004 14:19	Shopping list from: Dell Marketing L.P.	Jan 30, 2004	Jan 30, 2004	1	No

Edit List Properties

Diagram 4.2.9 Each Epylon List is described at the top of the page. Below this section are the actual line items.

9. Scroll down on the List page to view the line item(s) you returned from the vendor's website.
   - Lists can be "reused" for multiple purchase orders over time. Navigate to your Lists by clicking Shop - My Lists in Epylon. Open the list by clicking on the List name.
   - Each time you add a List item to a PO form, you can adjust the quantity you order.

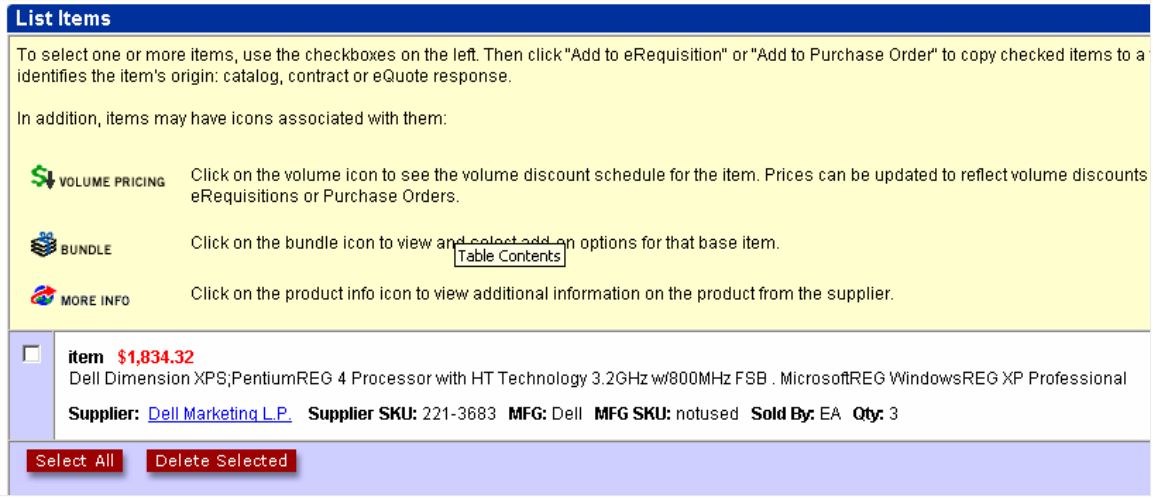


Diagram 4.2.10 Below the Description of the List, individual line items can be viewed.

Items on a List

Locate Products → **Finalize Price** → **Get PO Approval** → **Complete PO**

Once your items are on a List, you have three options (assuming you have full purchasing authority on your user login).

The three options with your items are: (Diagram 4.2.11)

1. **Fast path** – take me directly to "complete PO" and skip any online price negotiations or approvals. To do this, you will add the item(s) from the List directly to a Purchase Order form.
2. **Finalize Price** with Spot Price Check. This is an online price negotiation tool that is beneficial if you are ordering in volume. Note: Spot Price Checks are not available on items from a punchout session.
3. **Get PO Approval** – you may choose to use Epylon to route an eRequisition for internal approval. Use the eRequisition form to route the items for approval within your organization.

The next few paragraphs explain how to make use of these three options.

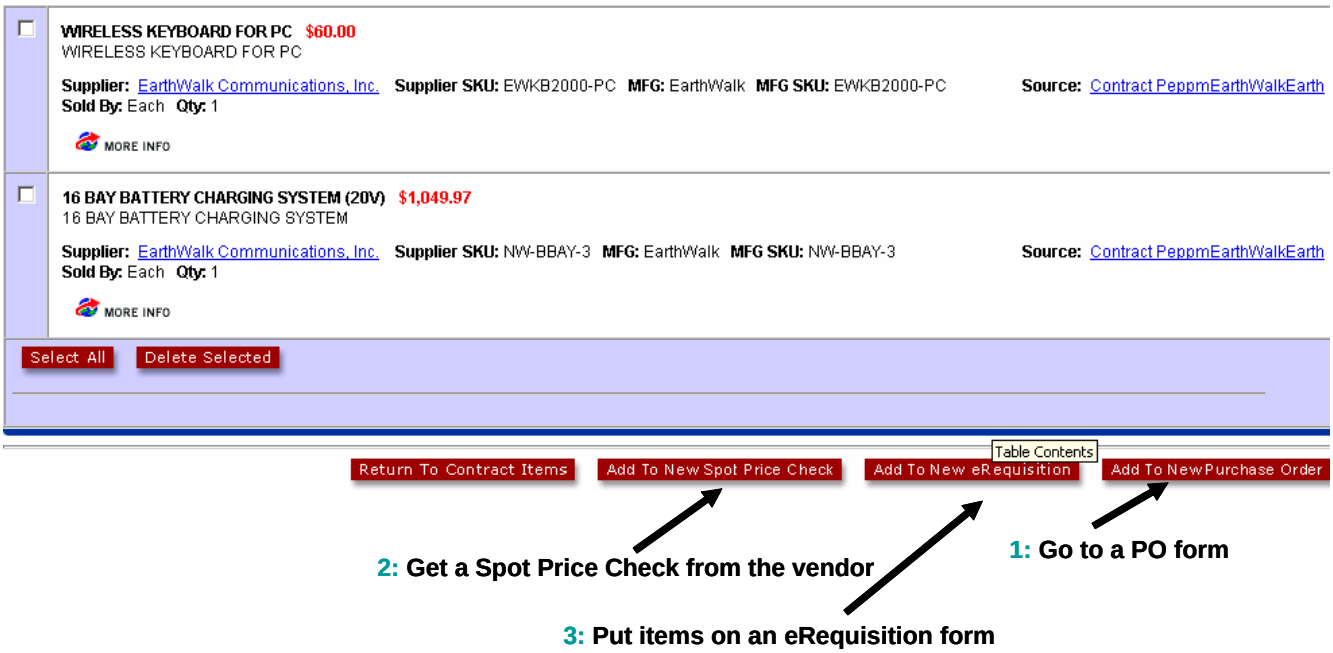


Diagram 4.2.11 From an Epylon list, you can take line items out for a Spot Price Check, to an eRequisition form, or directly to a PO form.

1. Complete the PO form

Locate Products → Finalize Price → Get PO Approval → **Complete PO**

When you are ready to make a purchase, you will check your line items and add them to a Purchase Order. This automatically generates a form and requires just a few additional pieces of information.

Note: You can bring items to a PO form using the steps below from a List, Spot Price Check response, or an approved eRequisition.

1. Using the boxes to the left of the item, select the item(s) on the list that you want to add to a Purchase Order.
2. Click the "Add to New Purchase Order" button.
3. A form will automatically generate and you only need to specify a few key pieces of information:
    1. Ship To Address (pick from preset list)
    2. Ship to Contact Name (if not already indicated with the address you picked)
    3. PO Number
    4. Shipping Method
4. Click "Continue" to review the PO form.
5. Click "Submit" to issue the PO directly to the vendor.
6. A notification is sent to the vendor automatically and the PO is viewable immediately to them.

Other Notes:
If you obtained a price quote from outside Epylon:

- Manually adjust the per unit prices to reflect your quote price. The price must be at or below the current PEPPM price.
- Attach supporting documentation in the Attachments section (below the Item listing).
- Buyers taking advantage of E-rate discounts must indicate this on the PO, by using the words "E-rate Purchase Order" so vendors can act on it accordingly.

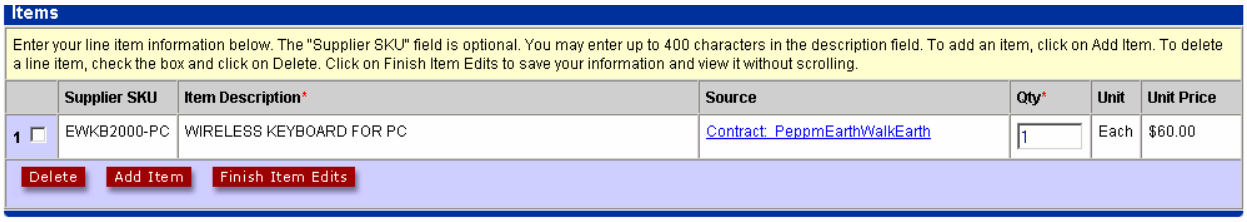
If there are other special circumstances, use the Additional Information field below the Items. If you need more space, use the External Notes History section. Vendors can view these notes when they receive your purchase order.

2. Perform Spot Price Check

Locate Products → **Finalize Price** → Get PO Approval → Complete PO

To perform a Spot Price Check, use the following steps from a List:

1. Select the item(s) in the list that you want to quote.
2. Click "Add to New Spot Price Check"
3. Provide key pieces of information for the contracted supplier to respond. You are required to specify a Ship To Address. You should also indicate the quantity in the Item Description field(s).
4. After completing the form, click Continue.
5. Review the form and click "Submit." This request will only be seen by the contracted vendor.
6. Once the vendor has responded, you will be notified via e-mail.
7. Check your eQuote inbox for the vendor's response once it arrives.



Items

Enter your line item information below. The "Supplier SKU" field is optional. You may enter up to 400 characters in the description field. To add an item, click on Add Item. To delete a line item, check the box and click on Delete. Click on Finish Item Edits to save your information and view it without scrolling.

	Supplier SKU	Item Description*	Source	Qty*	Unit	Unit Price
1 ☐	EWKB2000-PC	WIRELESS KEYBOARD FOR PC	Contract: PeppmEarthWalkEarth	1	Each	$60.00

Delete | Add Item | Finish Item Edits

Diagram 4.2.12 In a Spot Price Check, be sure to adjust your quantity to get a volume price

8. Open the price quote and view the pricing.
9. If it is acceptable, you can convert this Spot Price Check result to an eRequisition form or a PO form by clicking the "Add to Purchase Order" button. See steps above for completing the PO form.
10. Assuming you proceed directly to a PO form, you will be prompted for a PO Number. The references to the spot price quote and the PEPPM contract will be maintained automatically by the system.

Important Note about eQuote

Spot Price Checks are used for checking on volume and special pricing from products on existing contracts.

Do not confuse Spot Price Checking with running an eQuote for products and prices.

eQuotes should not be used for obtaining PEPPM prices. eQuotes are effective and specifically designed for checking prices on items that are NOT under an existing contract (e.g., PEPPM).

If you are interested in using the eQuote feature, please contact an Epylon representative for some quick phone training and instruction. We are happy to help you explore this great feature and use it to your best advantage.

Epylon Customer Service
888-211-7438
service@epylon.com

3. Use an eRequisition

Locate Products → Finalize Price → **Get PO Approval** → Complete PO

For simple approval routing, use the following steps:

1. From a List, select the item(s) and add them to a New or Existing eRequisition form.
2. Complete as much of the eRequisition with information such as a Ship To Address for the items.
3. Click "Continue" when you have completed the form.
4. Click "Forward" when you have reviewed the eRequisition form
5. Choose your approver from the drop down list of names.
6. Click "Submit" to send your eRequisition to the approver.
7. The approver will be notified via e-mail that your eRequisition is in their eRequisition inbox on Epylon.
8. Once approved, you will see a status change reflected on your eRequisition Inbox. Depending on your procedures, your approver may have made the purchase (Status=Submitted for Purchase) or they may have returned the eRequisition to you for purchasing (Status=Waiting Purchasing)
9. If you see a status "Waiting Purchasing" it means that you need to convert an eRequisition to a PO and send it. To do this, simply open the eRequisition and scroll to the bottom of the form.
10. Click "Add to Purchase Order."
11. See steps above for completing the PO form.

Basic Navigation in Epylon

In Epylon, navigation is done by using the horizontal bar to select a major category (e.g., Work, Shop, Contracts). Each of these major categories has at least one subcategory. For example, under Work, you will find your three main Inboxes (eRequisition, eQuote, Purchase Order.)

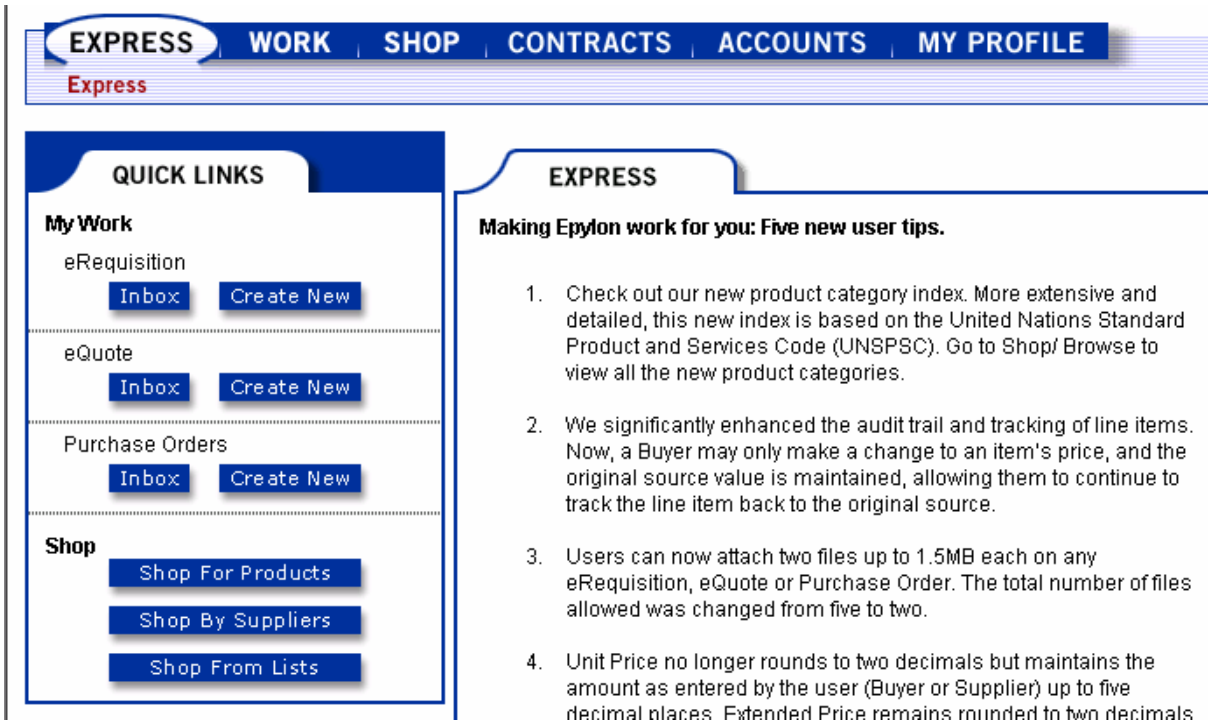


Diagram 4.2.13 Epylon Main "Express" Page

Quick Reference to Major sections of Epylon

Epylon Navigation

Tab / Section	Features
Express	• Quick Links for fast and easy navigation. • Release notes or user tips.
Work	• eRequisition form inbox • eQuote and Spot Price Check form inbox • Purchase Order form inbox
Shop	• Browse path by product type (many non-PEPPM items) • Search path (many non-PEPPM items) • My Lists contains a listing of all lists from

		Contract searches and Punchout activity • Shared Lists contains lists created by others in your organization that they flagged for shared use.
	Contracts	• Simple contract search by line item or contract • Advanced Search for line items or contracts
	Accounts	• Only visible to users with the Super Administrator role • Add and remove users • Manage Ship-To Addresses • Your organization's address and main contact information • Create a preferred supplier list for faster eQuote generation
	My Profile	• Your user name and address information • Description of your user privileges • Reset your password

Epylon Inboxes

In Epylon, your work will be done from three main Inboxes:

- eRequisition Inbox
- eQuote Inbox
- Purchase Order Inbox

These inboxes can be accessed from the Quick Links section or by clicking on the Work tab. A given purchase may have started as a Spot Price Check, become an eRequisition, and been converted into a PO. Epylon links all these forms for easy cross-reference. No form can be deleted, but all forms can be Archived. Once Archived, a form can not be moved back to an Inbox.

eRequisition Inbox
Your eRequisition Inbox contains a listing of all eRequisitions that you have created or that someone has forwarded to you. By viewing the status (and Internal Notes on the form) you can keep track of "who's desk is my requisition sitting on?" and "is my requisition approved yet? Has someone sent a PO?"

eQuote Inbox
Your eQuote Inbox contains all eQuotes and Spot Price Checks that you have created. See the "Important Note about eQuote" section earlier in this topic for clarification of the difference between eQuote

and Spot Price Checks.

PO Inbox
Your PO Inbox lists all POs that you have created and sent. If the vendor has update the status of the PO (e.g., to read "Shipped") you can view this information from your Purchase Order Inbox.

Questions? If you have questions about the Epylon system and its features, please contact Epylon representatives. We can provide additional information, documentation, and training.

Epylon Customer Service
888-211-7438
service@epylon.com

Section 5: Communication and Program Feedback

Topic 5.1	Talk with PEPPM Staff
Overview	The strength of the PEPPM Program comes from the educational agencies that use PEPPM to buy and work with us to improve and build the PEPPM Program. Throughout the year, you will see representatives at tradeshows, events, and sometimes individual visits. We always look forward to the opportunity to speak with educational agency officials.
Tradeshows **(not a complete schedule)**	The following Trade Shows are attended annually. Please go to www.peppm.org to see updated list and associated dates. • PETE & C (Pennsylvania Educational Technology Expo & Conference) • ASBO (Association of School Business Officials) International Conference • PASBO (Pennsylvania Association of School Business Officials) Annual Conference • CASBO (Connecticut Association of School Business Officials) Annual Conference • CASBO (California Association of School Business Officials) Annual Conference • Diocese of Allentown – Education Conference • MD/DC ASBO (Maryland /District of Columbia Association of School Business Officials) Annual Conference • NCCE (Northwest Council for Computer Education) Annual Conference • ISTE (International Society for Technology in Education) Annual Conference

- NIGP (National Institute of Government Purchasing, Inc.) Annual Conference
- CETPA (California Educational Technology Professionals Association) Annual Conference
- FETC (Florida Educational Technology Conference)
- AESA (Association of Education Service Agencies) Annual Conference
- CREC Vendor Showcase Day - Hartford, Connecticut
- NCSC (National Charter Schools Conference)
- TCEA (Texas Computer Education Association) Annual Conference

Regional Meetings

Throughout the year, PEPPM, our partner Agencies and Epylon will host regional meetings where business officials, buyers, and technology managers can come to learn more about the PEPPM Program.

As these events are planned, we will announce them through our website and e-mail.

Site Visits

In addition to regional meetings, we travel to meet with individual districts and educational agencies.

If you are interested in eCommerce or just want to know more about using PEPPM, contact us. We can plan to come by or we can participate in a conference call.

The PEPPM Program and Epylon Staff

The PEPPM Program is supported by an experienced staff. You are welcome to contact the staff with any questions you have about the PEPPM Program.

PEPPM Contract Contacts

Dave Manney
dmanney@peppm.org
570-523-1155 x2174

Jared Lehman
jlehman@peppm.org
570-523-1155 x2169

Order Processing Contacts

Pam Murray
pmurray@peppm.org
570-523-1155 x2193

Carol Styers
cstyers@peppm.org
570-523-1155 x2161

Michelle Kipple
mkipple@peppm.org
570-523-1155 x2126

Epylon Contacts

Ted Witt
tedwitt@epylon.com
916-826-2039

Suzanne Barchi
sbarchi@epylon.com
209-992-6181

Racquel Landoff
rlandolf@epylon.com
925-407-1036

Technical Support

Epylon Customer Service
service@epylon.com
888-211-7438

Mark Carollo (PEPPM Website Administrator)
mcarollo@peppm.org
570-523-1155 x2159

Section 5: Communication and Program Feedback

Topic 5.2 PEPPM Communication Program

Overview

We strive to continuously improve the PEPPM Program to better meet your needs for outstanding technology products, pricing and vendors.

Another key goal is keeping in touch with the needs of educational agencies in the geographies we serve. To that end, we have provided the PEPPM website at www.peppm.org, information in PennLink, email and surface mail messages, and provided resources like this Guide.

PEPPM Reports

Reports You Receive
Educational agencies with 10 or more POs per quarter are eligible to receive a report of all purchases made through PEPPM.

We will continue to archive your purchase orders and provide bid protection services, but the reports provide you with an opportunity to review your PEPPM purchases. See more about Reports in Section 3.3. For more on bid protection, see Section 3.1.

Questions, Comments or Feedback?

We would like to hear from you if you have questions, comments or feedback about the PEPPM Program. Please feel free to use our contact information to reach anyone in the PEPPM Program.