How to Place Limit Orders for Services

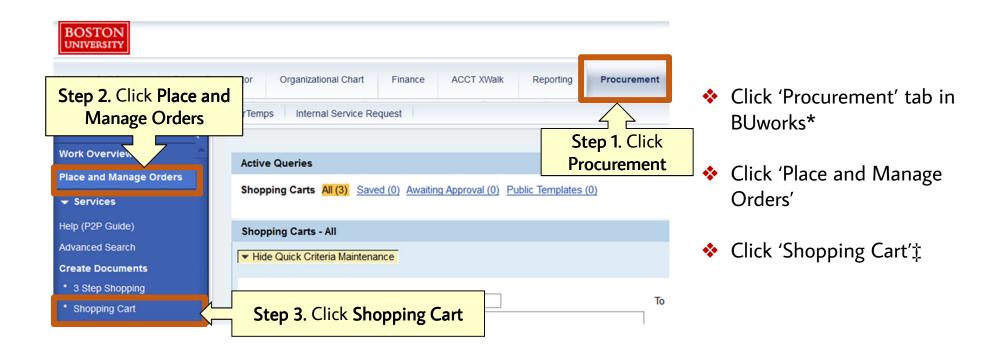Sourcing & Procurement

Limit Orders

Limit order shopping carts are created for purchasing services.

Step 2. Click **Place and Manage Orders**

Step 1. Click **Procurement**

Step 3. Click **Shopping Cart**

❖ Click 'Procurement' tab in BUworks*

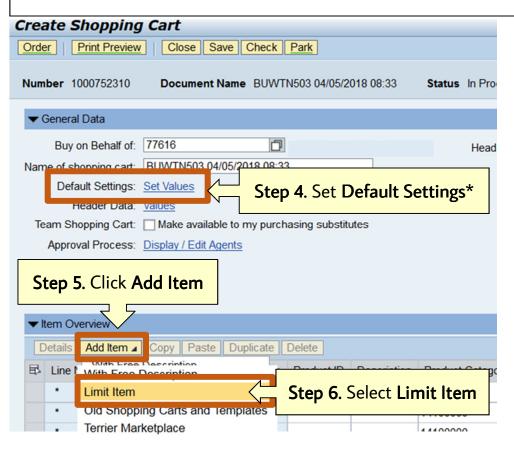❖ Click 'Place and Manage Orders'

❖ Click 'Shopping Cart'‡

*Individuals must have the designated 'Shopper' role in BUworks to place shopping cart orders.
‡Clicking Shopping Cart will open a cart in a new window.

Limit Orders

Proposals, quotes, or descriptions of services should be on hand at the time of placing the order.

Create Shopping Cart

| Order | Print Preview | Close | Save | Check | Park |

Number 1000752310   Document Name BUWTN503 04/05/2018 08:33   Status In Pro

▼ General Data

Buy on Behalf of: 77616   Head

Name of shopping cart: BUWTN503 04/05/2018 08:33

Default Settings: **Set Values**   **Step 4. Set Default Settings***

Header Data: Values

Team Shopping Cart: ☐ Make available to my purchasing substitutes

Approval Process: Display / Edit Agents

Step 5. Click Add Item

▼ Item Overview

| Details | Add Item ◢ | Copy | Paste | Duplicate | Delete |

Line With Free Description   Product ID Description Product Categ

With Free Description

Limit Item   **Step 6. Select Limit Item**

Old Shopping Carts and Templates

Terrier Marketplace

❖ Click 'Shopping Cart' to open a new shopping cart in a separate window

❖ Click 'Set Values' to set Single-Cart Default Values *

❖ Click 'Add item'
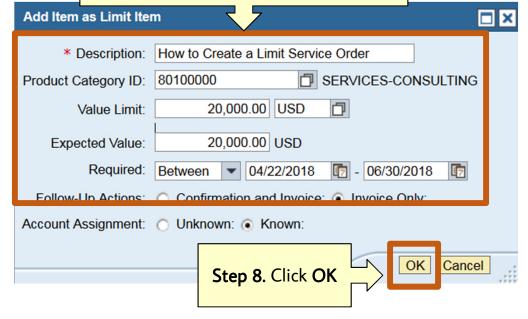
❖ Select 'Limit Item' to generate a pop-up window

*If required or applicable, set default delivery address and account assignment <u>before</u> adding an item to the cart. See 'Single-Cart Default Settings' for instructions (http://www-staging.bu.edu/sourcing/how-to-place-orders/).

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Limit Orders

The dollar amounts set in the Value Limit and Expected Value sections are never visible to the supplier.

Step 7. Enter Engagement Information

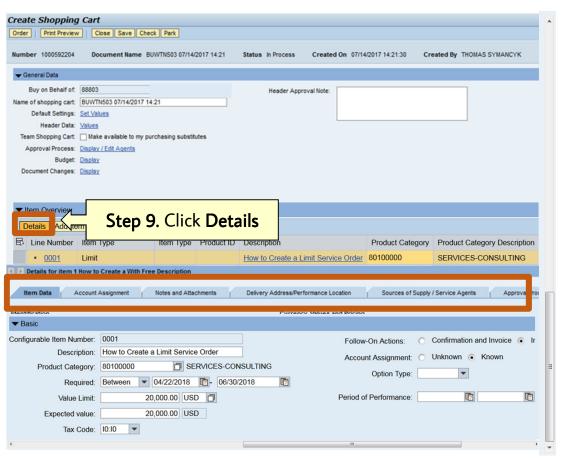**Add Item as Limit Item**

* Description: How to Create a Limit Service Order
Product Category ID: 80100000 SERVICES-CONSULTING
Value Limit: 20,000.00 USD
Expected Value: 20,000.00 USD
Required: Between ▼ 04/22/2018 - 06/30/2018
Follow-Up Actions: ○ Confirmation and Invoice; ● Invoice Only;
Account Assignment: ○ Unknown: ● Known:

OK   Cancel

Step 8. Click **OK**

❖ Enter the engagement information in the pop-up window sections:
  ❖ Description
  ❖ Product Category*
  ❖ Value Limit & Expected Value‡
  ❖ Required Dates: *Full engagement term or term for one fiscal year.*

❖ Click 'Add Item to Overview' to add item to the cart and close the pop-up window

*See 'How to Assign Product Category' for instructions (http://www-staging.bu.edu/sourcing/how-to-place-orders/). General Ledger (G/L) codes are automatically assigned based on Product Category.

‡ Make Value Limit & Expected Value dollar amounts the same and should reflect total anticipated cost or budgeted amount for the engagement including estimated unforeseen fees.

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Limit Orders

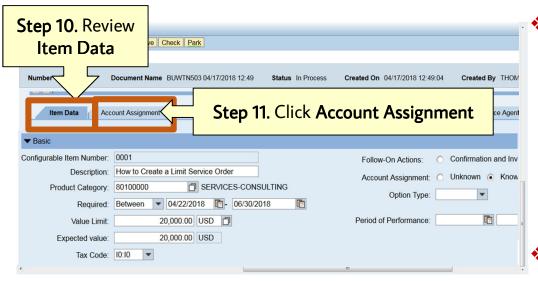Limit item shopping carts typically have one line item only for the total dollar amount of the engagement.

❖ Click 'Add Item to Overview' to add item to the cart

❖ Click 'Details'*

❖ Scroll to the bottom of the page to review item detail tabs

*The line item must be highlighted (appears yellow) to click the Details button.

Limit Orders

Add a buffer to the dollar amount of the order to cover unforeseen costs.

Step 10. Review Item Data

Step 11. Click **Account Assignment**

Number | Document Name BUWTN503 04/17/2018 12:49 | Status In Process | Created On 04/17/2018 12:49:04 | Created By THOM

Item Data | Account Assignment

▼ Basic

Configurable Item Number: 0001
Description: How to Create a Limit Service Order
Product Category: 80100000 □ SERVICES-CONSULTING
Required: Between ▼ 04/22/2018 □ - 06/30/2018 □
Value Limit: 20,000.00 USD □
Expected value: 20,000.00 USD
Tax Code: I0:I0 ▼

Follow-On Actions: ○ Confirmation and Inv
Account Assignment: ○ Unknown ● Know
Option Type: ▼
Period of Performance: □

❖ Review the following in 'Item Data' Tab:
  ❖ Description
  ❖ Product Category *
  ❖ Value Limit & Expected Value‡
  ❖ Required Dates: Full engagement term or term for one fiscal year.

❖ Click 'Account Assignment' Tab

*See 'How to Assign Product Category' for instructions (http://www-staging.bu.edu/sourcing/how-to-place-orders/). General Ledger (G/L) codes are automatically assigned based on Product Category.
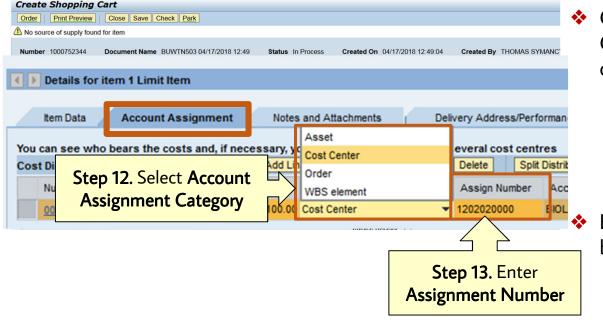‡ Make Value Limit & Expected Value dollar amounts the same and should reflect total anticipated cost or budgeted amount for the engagement including estimated unforeseen fees.

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Limit Orders

The Account Assignment category depends on the assignment number used to pay for the line item.

Create Shopping Cart

Order | Print Preview | Close | Save | Check | Park

⚠ No source of supply found for item

Number 1000752344   **Document Name** BUWTN503 04/17/2018 12:49   **Status** In Process   **Created On** 04/17/2018 12:49:04   **Created By** THOMAS SYMANC

◄ ► **Details for item 1 Limit Item**

| Item Data | **Account Assignment** | Notes and Attachments | Delivery Address/Performan |

You can see who bears the costs and, if necessary, y[...]everal cost centres

Cost Di [Add Li] Delete | Split Distrib

Asset
Cost Center
Order
WBS element

Cost Center ▼   1202020000   BIOL

Step 12. Select **Account Assignment Category**

Step 13. Enter **Assignment Number**

❖ Click 'Account Assignment Category' dropdown to select one of the following:
   ❖ Asset
   ❖ Cost Center: **1**xxxxxxx
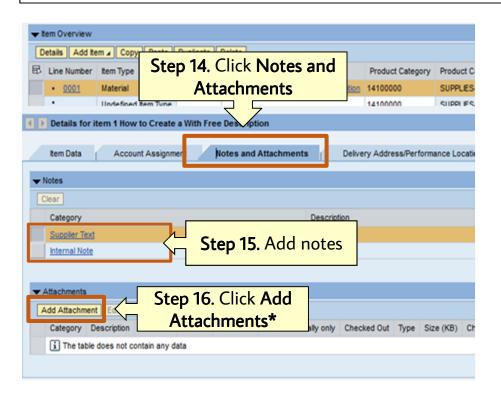   ❖ Order: **9**xxxxxxx
   ❖ WBS Element

❖ Enter the cost or fund number to be charged for this purchase *

*Limit Orders must be charged in full to one account, account assignment splitting cannot be done on Limit Orders.

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Limit Orders

Limit order shopping carts should always have documentation attached. Orders over $5,000 require attached documentation to submit the order.
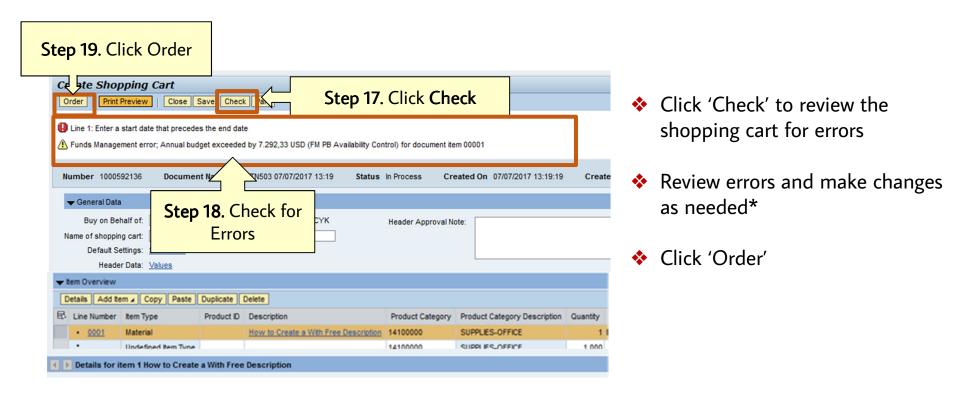

Step 14. Click **Notes and Attachments**

Step 15. Add notes

Step 16. Click **Add Attachments***

❖ Click 'Notes and Attachments' tab

❖ Click blue 'Internal Note' or 'Supplier Text' links to add notes to the supplier or buyer ±

❖ Click 'Add Attachment' to attach relevant documentation including:
   ❖ Quotes
   ❖ Proposals
   ❖ Price lists
   ❖ Proof of Competitive Bid

* See 'Adding Attachments' for instructions (http://www-staging.bu.edu/sourcing/how-to-place-orders/).

± Suppliers cannot be assigned to limit item shopping carts by shoppers, supplier information must be provided by the shopper in the Internal Notes of the cart.

Limit Orders

All service limit orders go to Sourcing & Procurement for manual purchase order creation.

Step 19. Click Order

Step 17. Click **Check**

Step 18. Check for Errors

❖ Click 'Check' to review the shopping cart for errors

❖ Review errors and make changes as needed*

❖ Click 'Order'

Create Shopping Cart

[Order] [Print Preview] [Close] [Save] [Check]

🛑 Line 1: Enter a start date that precedes the end date

⚠️ Funds Management error; Annual budget exceeded by 7.292,33 USD (FM PB Availability Control) for document item 00001

Number 1000592136   Document N⸱⸱⸱N503 07/07/2017 13:19   Status In Process   Created On 07/07/2017 13:19:19   Create⸱⸱⸱

▼ General Data

Buy on Behalf of: ⸱⸱⸱CYK   Header Approval Note:
Name of shopping cart:
Default Settings:
Header Data: Values

▼ Item Overview

[Details] [Add Item ⸱] [Copy] [Paste] [Duplicate] [Delete]

	Line Number	Item Type	Product ID	Description	Product Category	Product Category Description	Quantity
	• 0001	Material		How to Create a With Free Description	14100000	SUPPLIES-OFFICE	1
	•	Undefined Item Type			14100000	SUPPLIES-OFFICE	1.000

▶ Details for item 1 How to Create a With Free Description

🛑   *Red icons indicate errors <u>must</u> be corrected before clicking Order

⚠️   Yellow Icons are notifications that <u>do not require action</u> to click Order

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Sourcing & Procurement
Additional Resources

Ordering Information
Sourcing & Procurement:

Website: www.bu.edu/sourcing
Email: sourcing@bu.edu

Invoice Payment Information
Accounts Payable:

Website: www.bu.edu/ap/resources
Email: invoices@bu.edu