Types of shopping carts:
1. Terrier Marketplace catalog
2. Free Description
3. Limit Orders

≥ $10,000
1. Sourcing & Procurement
2. Department Financial Approver
3. Compliance Review (if required)

≥ $500
1. Department Financial Approver
2. Compliance Review (if required)

< $500
No Approval Required
Compliance Review (if required)

Order Placed
• PO Issued to supplier
• PO has unique number

Order Fulfilled
• Supplier provides products or services ordered

Invoice Billed & Posted
• Invoice sent to Accounts Payable (invoices@bu.edu)
• PO number on Invoice
• Invoice posted to PO, PO sent to Approver’s Worklist

Department Approval

Invoices Under $5,000:
• 3 days before auto-approval

Invoices Over $5,000:
• Approval required before payment

Payment
• Supplier’s receive payment based on the payment terms
• Standard Payment Terms: Net 60 days
Approve Shopping Carts

When a shopping cart is sent to your worklist for approval, you will be notified via an automated email.

Access ‘Worklist’ via email link or BUworks directly

Step 1. Access Worklist

1. Access Worklist via email link or BUworks directly

- Use the email notification to log on to the worklist.
- Access the shopping carts in your worklist.

2. Review the shopping carts in your worklist.

- Check the details of each cart.
- Approve or reject the carts as necessary.

3. Submit your approval.

- Once all necessary carts are approved, submit your approval.
- Confirm that the approval has been received.

4. Finalize the purchase.

- Complete the purchase process.
- Confirm that the purchase has been completed.

By following these steps, you can successfully approve shopping carts and ensure that the necessary items are purchased for your worklist.

BOSTON UNIVERSITY
Pending Your Approval

Click the blue link to open the shopping cart in a new window.

❖ Click the blue shopping cart link

Step 2. Click Blue Link
Review the Cart

Click **Edit** to make changes to the cart before selecting Approve, Reject, or Inquire.

**Areas to Review**

**Item Type:** Material vs. Limit

**Product Category:** Services vs. Supplies vs. Capital

**Price:** Reasonable, Accurate (i.e., matches quote or contract price)

**Account Assignment:** Correct Cost Center, Internal Order

**Supplier:** Assigned (i.e., if registered)

**Header Approval Notes:** Additional details, critical information

**Documentation:** Quotes, proposals, descriptions of services, if over $25K - bid documentation or Sole Source Justification form attachments required
Approve/Reject/Inquire Cart

Review the shopping cart before selecting Approve, Reject, or Inquire.

- Complete cart review and edits (if needed)
- Select action from the following buttons:
  - *Approve*: Sends cart to next stage in process
  - *Reject*: Terminates cart permanently
  - *Inquire*: Sends cart back to shopper for revision before resubmission
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