

How to Approve Shopping Carts



Sourcing & Procurement

BUworks Procurement Process

Shopping Cart Creation

Order, Fulfillment, Billing

Payment Approval

Payment

Shopping Cart Creation

Shopping Cart Approval

Order Placement, Fulfillment, Billing

Invoice Approval

Payment to Supplier



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

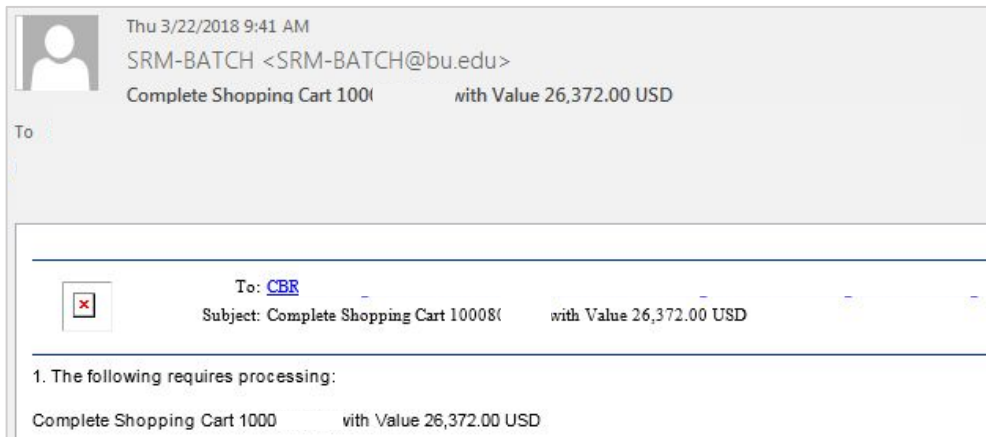


- Supplier's receive payment based on the payment terms
- Standard Payment Terms: Net 60 days

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

Worklist

Item Data		
Description	Product	Quantity
Reupholster Encoe Task Chairs		200
BFD Certificate		1
Freight		4
Account Data		

Subject	Initiator	Sent Date	Due Date	Status
Approve/Reject/Change Parked Document 1003182872-ZJ	Train 503, BUworks	Mar 15, 2018		New
Complete Shopping Cart 1000752226 with Value 4,000.00 USD	Train 503, BUworks	Feb 20, 2018	Feb 22, 2018	New
Change Parked Document 1003182704	Train 707, BUworks	Feb 20, 2018		New
Complete Shopping Cart 1000752090 with Value 4,000.00 USD	Train 503, BUworks	Dec 7, 2017	Dec 9, 2017	New

Pending Your Approval



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

❖ Click the blue shopping cart link

BOSTON UNIVERSITY

ne Employee Self-Service Manager Self-Service Payroll Coordinator Organizational Chart Finance ACCT XWalk Reporting Procurement **Worklist**

Related Links
Help - Worklist User Guide

Tasks (9 / 11) Alerts Notifications

Show: New and In Progress Tasks (9 / 11) Select a Subview... All

Subject	Initiator	Sent Date	Due Date	Status
Approve/Reject/Change Parked Document 100318287223	Train 503, BUworks	Mar 15, 2018		New
Complete Shopping Cart 1000752226 with Value 4,000.00 USD	Train 503, BUworks	Feb 20, 2018	Feb 22, 2018	New
Change Parked Document 1003182704	Train 707, BUworks	Feb 20, 2018		New
Complete Shopping Cart 1000752090 with Value 4,000.00 USD	Train 503, BUworks	Dec 7, 2017	Dec 9, 2017	New

Step 2. Click Blue Link

Review the Cart



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

Approve Shopping Cart

Approve Reject Edit Print Preview Close Save Check Inquire

❖ Review the shopping cart

General Data

Buy on Behalf of: 53395 JENNY TRINH

Name of shopping cart: BUWTN503 02/20/2018 10:39

Header Data: [Values](#)

Team Shopping Cart: ☐ Make available to my purchasing substitutes

Approval Process: [Display / Edit Agents](#)

Budget: [Display](#)

Document Changes: [Display](#)

Header Approval Note:

Step 3. Review Shopping Cart

Item Overview

Details Add Item Copy Paste Duplicate Delete Process All Items Filter Settings

Line Number	Item Type	Item Type	Product ID	Description	Product Category	Product Category Description	Quantity	Unit	Net Price / Limit	Currency	Attachments	Account Assignment	Item Status	Supplier
0001	Material			New SC for Approval	14100000	SUPPLIES-OFFICE	1	EA	4,000.00	USD	0	Cost Center (1202020000)	Awaiting Approval	None

Areas to Review

Things to Consider

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.

Change Shopping Cart and Proceed

Approve | Reject | Print Preview | Close | Save | Check | Inquire

Number: 1000752226 | Document: BUWTN503 02/20/2018 10:39 | Status:

Final Step. Select Action Button*

▼ General Data

Buy on Behalf of: 53395

Name of shopping cart: BUWTN503 02/20/2018 10:39

Default Settings: [Set Values](#)

Header Data: [Values](#)

Approval Process: [Display / Edit Agents](#)

Budget: [Display](#)

Records Management: [Display](#)

Document Changes: [Display](#)

- ❖ 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