Limit Orders

Sourcing & Procurement
Limit Orders

Limit order shopping carts are created for purchasing services.

Step 1. Click Procurement

Step 2. Click Place and Manage Orders

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

- 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 before adding an item to the cart. See ‘Single-Cart Default Settings’ for instructions (https://www.bu.edu/sourcing/h2po/#singlecartdefaults).
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**

- 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

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*See ‘How to Assign Product Category’ for instructions ([https://www.bu.edu/sourcing/h2pol/#prodcategories](https://www.bu.edu/sourcing/h2pol/#prodcategories)). 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.
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

❖ 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.

Step 11. Click Account Assignment

❖ Click ‘Account Assignment’ Tab

*See ‘How to Assign Product Category’ for instructions (https://www.bu.edu/sourcing/h2po/#prodcategories). 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.
Limit Orders

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

- Click ‘Account Assignment Category’ dropdown to select one of the following:
  - Asset
  - Cost Center: 1xxxxxxxx
  - Order: 9xxxxxxxx
  - 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.
Limit Orders

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

- 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 (https://www.bu.edu/sourcing/h2po/#addattachments).
± 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.
All service limit orders go to Sourcing & Procurement for manual purchase order creation.

**Step 17. Click Check**

- Click ‘Check’ to review the shopping cart for errors
- Review errors and make changes as needed*
- Click ‘Order’

*Red icons indicate errors **must** be corrected before clicking Order
Yellow Icons are notifications that **do not require action** to click Order
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