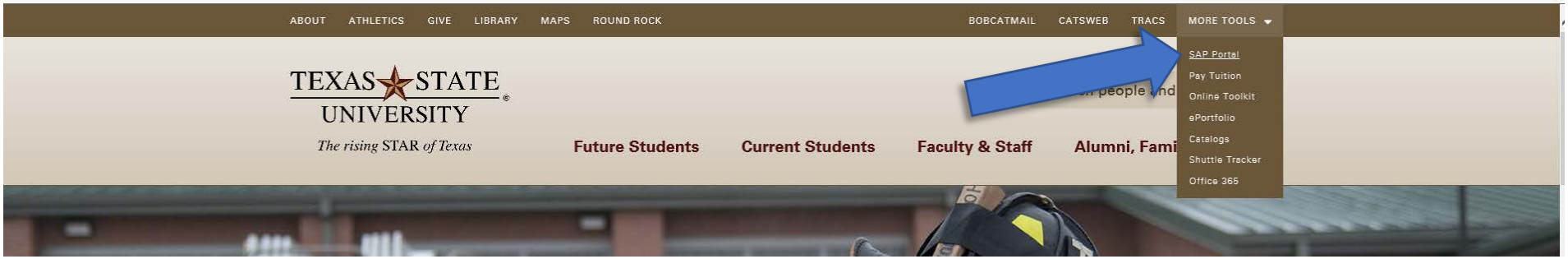
Creating A Limit Framework PO in the Marketplace

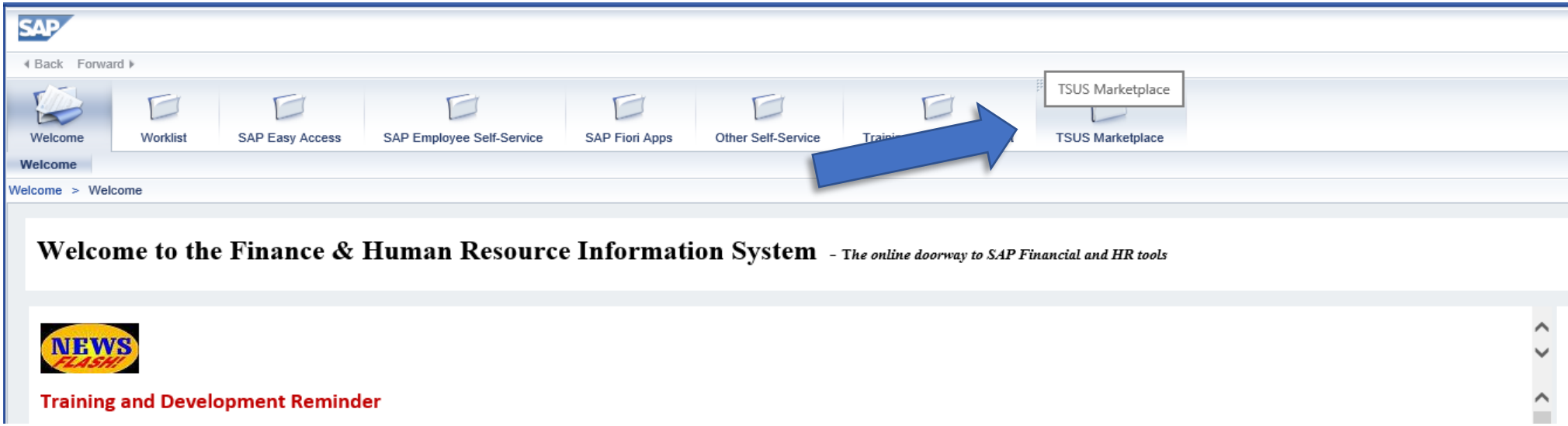
Only For Non-Catalog Orders

Framework purchase orders can be created in the Marketplace **for non-catalog orders.** Follow these step by step instructions to create your framework orders.

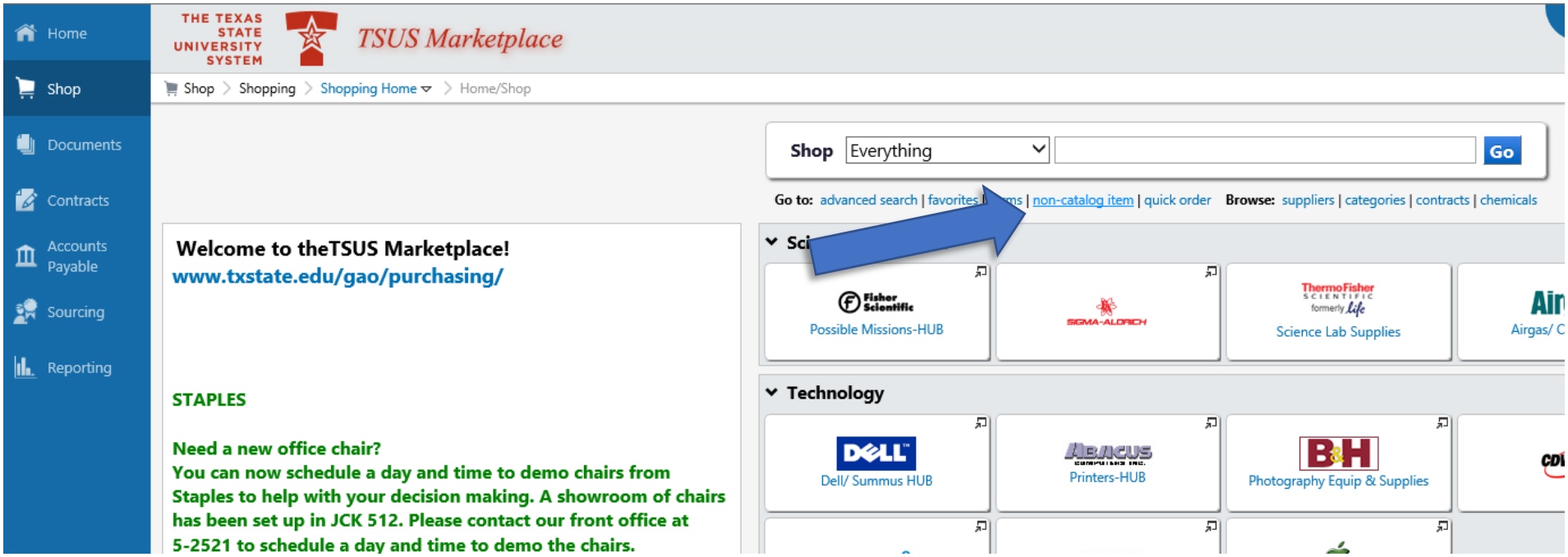
Step 1: Log Into TSUS Marketplace by going to the homepage at http://www.txstate.edu/. Then in upper right hand corner click "More Tools" and then SAP Portal. Log in.



1A) In the tabs click on "TSUS Marketplace"



1B) After the Marketplace Browser loads, you will click on the link, labeled “non-catalog item”



Step 2: A pop-up screen will appear titled, “Non-Catalog Item.”

2A) Enter Supplier- This is an active search field. Begin typing the name and the vendor will appear below. Select the vendor. If you do not see the vendor, contact purchasing to have the vendor “activated” for shopping. Once it has been activated, start from Step 2 and proceed forward.

2B) Enter a description in “Product Description”

2C) Leave “Catalog No.” blank

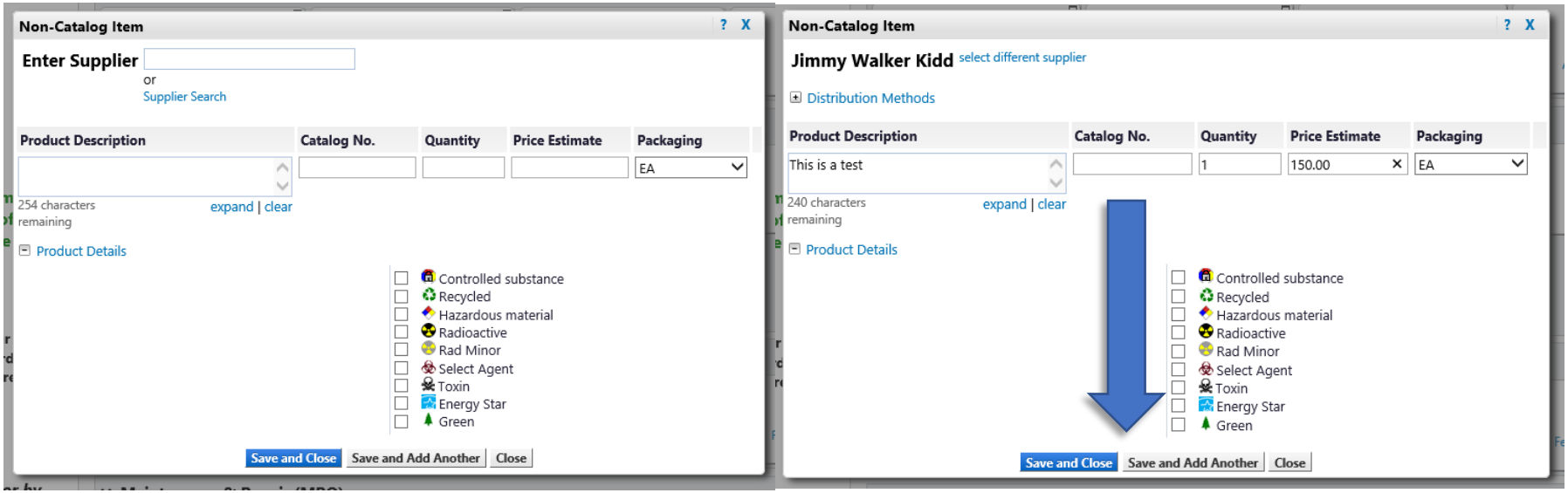
2D) Enter one (1) in the “Quantity”

2E) Enter the amount to be paid for the first line in “Price Estimate”

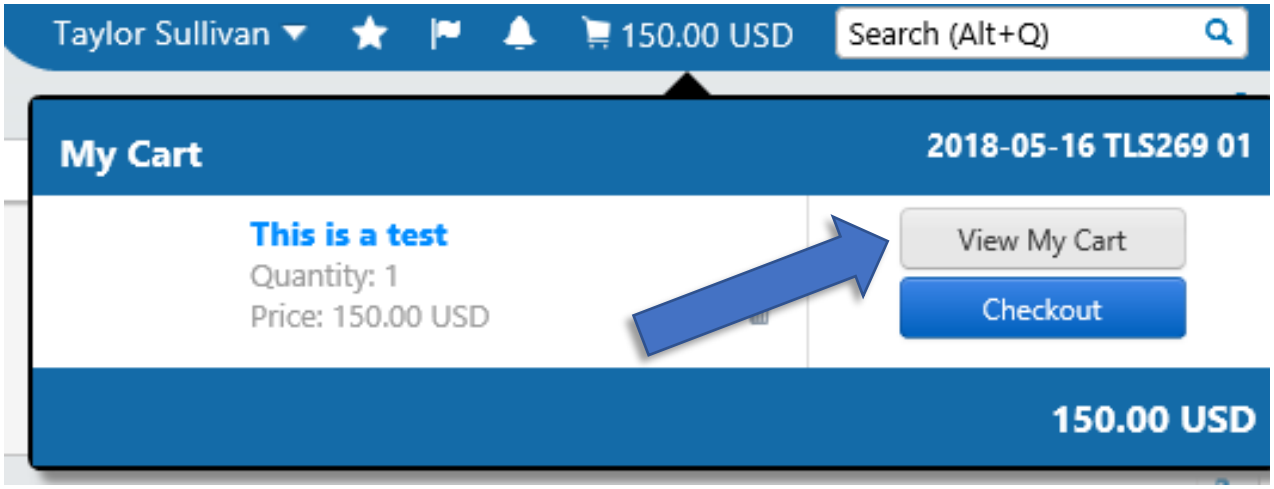
2F) Select “EA” as an option under “Packaging”

2G) If you are adding another item select “Save and Add Another”

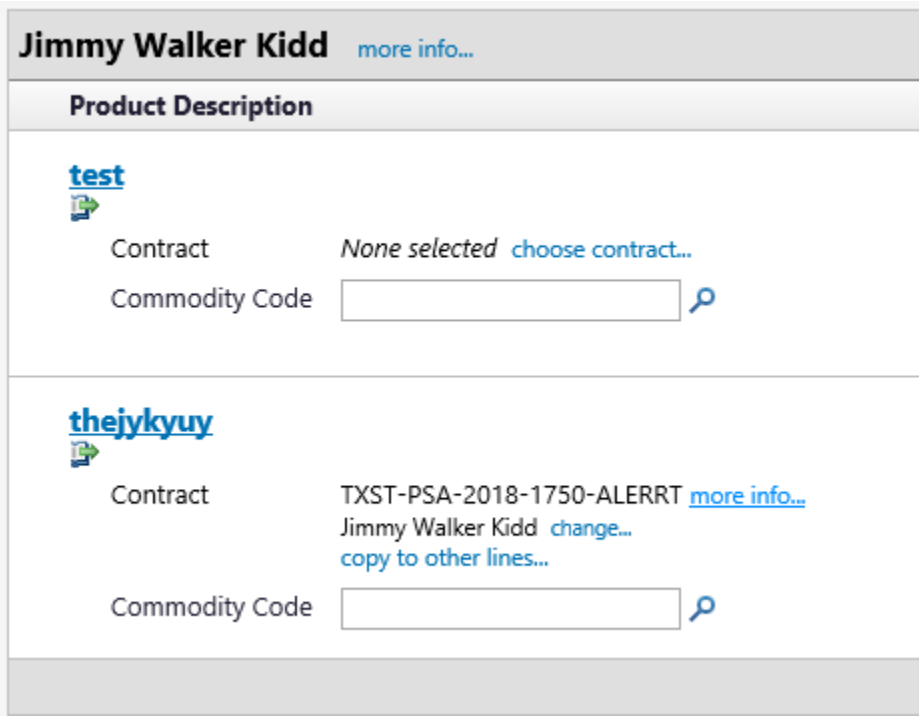
2H) If you are only ordering one item, click “save and close” when complete.

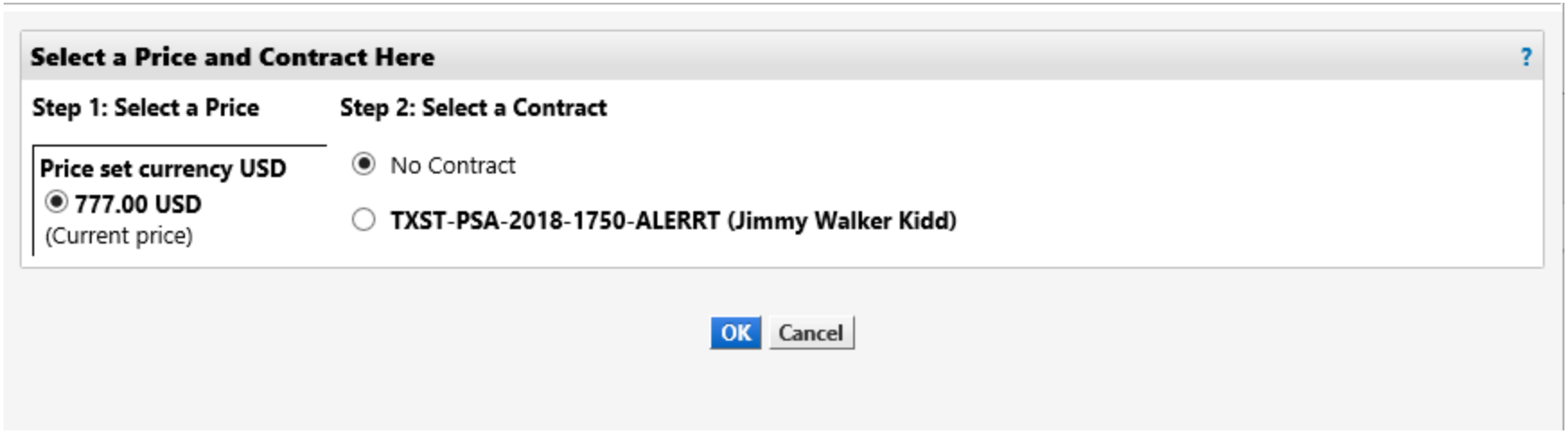


Step 3: Go to top right-hand corner of the screen and click the 'cart' icon and then click "View My Cart"



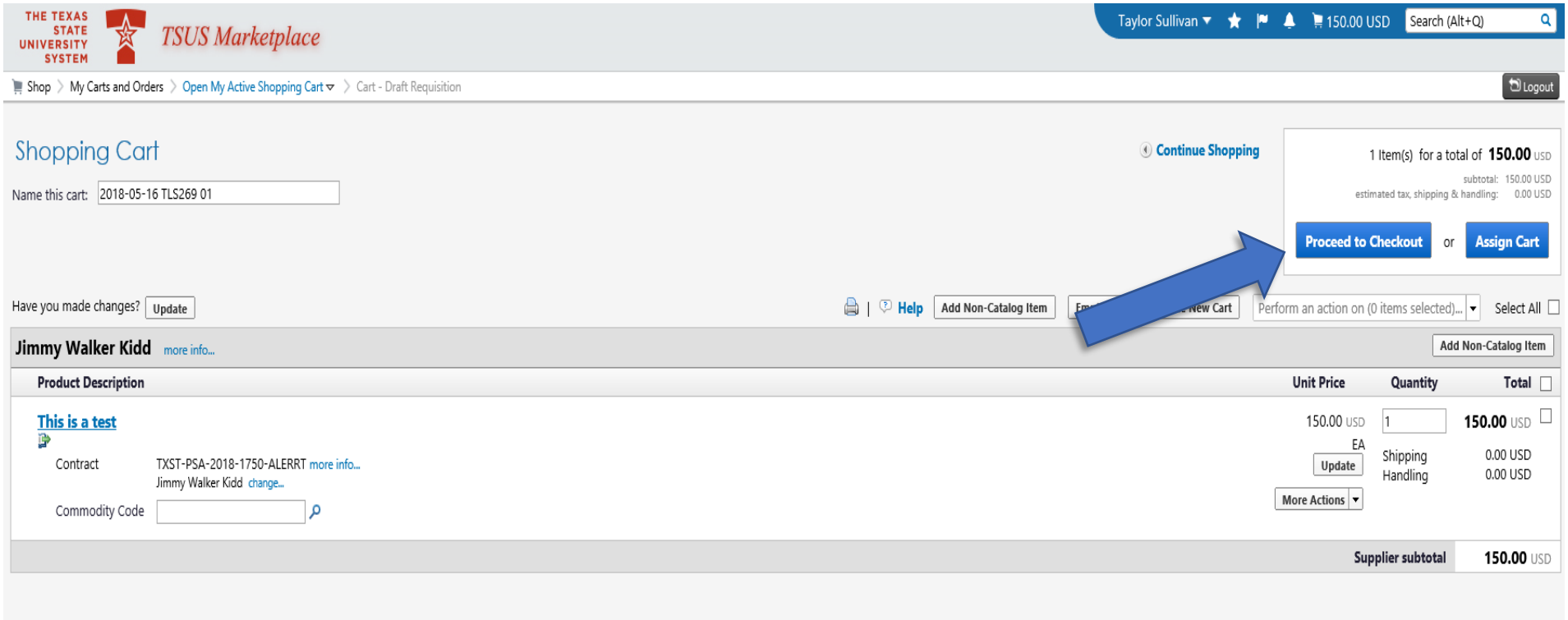
3A) Before clicking "proceed to checkout," make sure that if there's a contract for this individual or company, that it is shown in the "Contract" section.



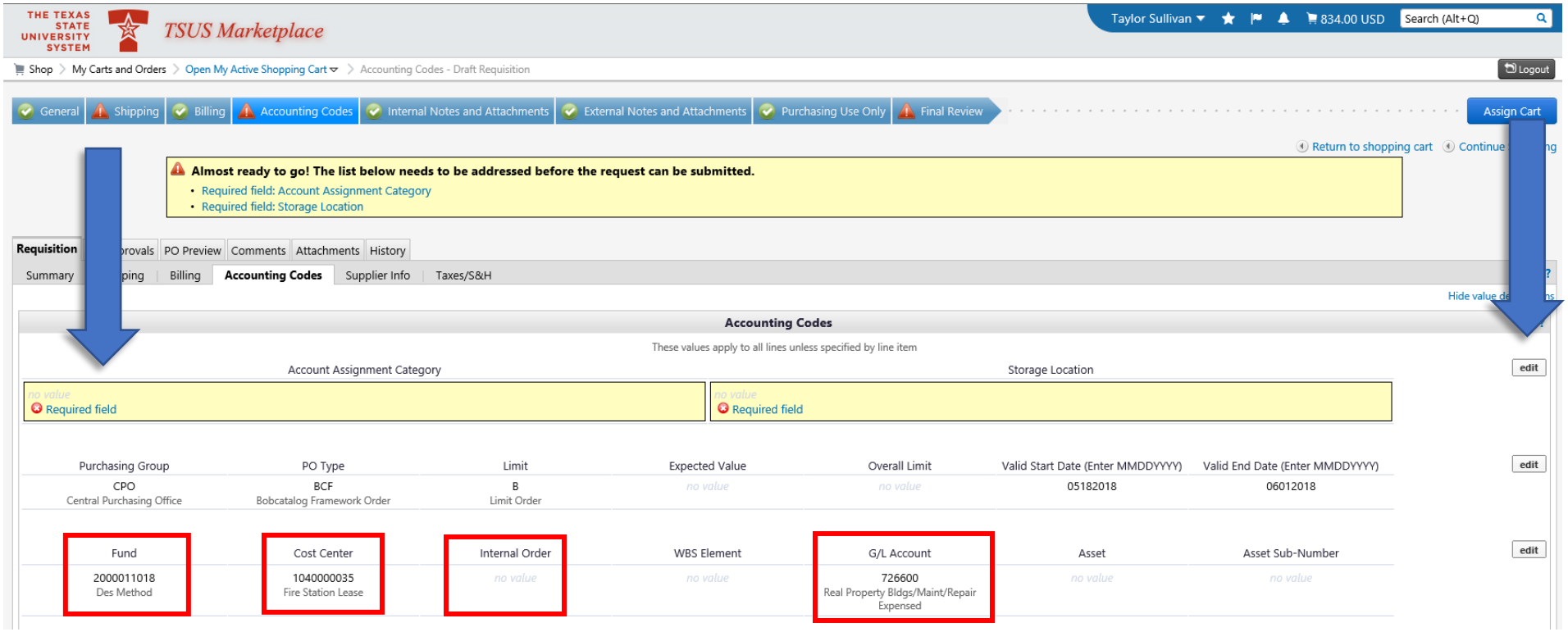


Once you click “Choose contract” or “change Contract,” a screen will pop-up and make sure you select the correct contract if there is one and select “OK”. If there isn’t a contract, select “No Contract.” and select “OK”.

Now, in the new screen, click “Proceed to Checkout”



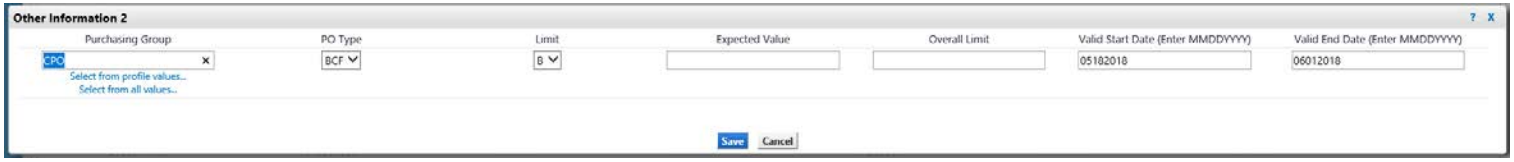
Step 4: Note the new fields that pop up and click on the tab, “Header Accounting Codes” for the framework values.



Please note: The “Header Accounting Code” section, as shown above, applies to every single line. If you need different accounting codes on different lines, then you must change the individual line’s “Accounting Codes” on the requisition. Only lines that **differ** from the “Header Accounting Code” section will need to be changed. Enter in the “required field” information to include the correct account combination; and then click “Save.”

To setup the Limit Framework, select “edit on the second line in the “Header Accounting Codes” section and input the following:

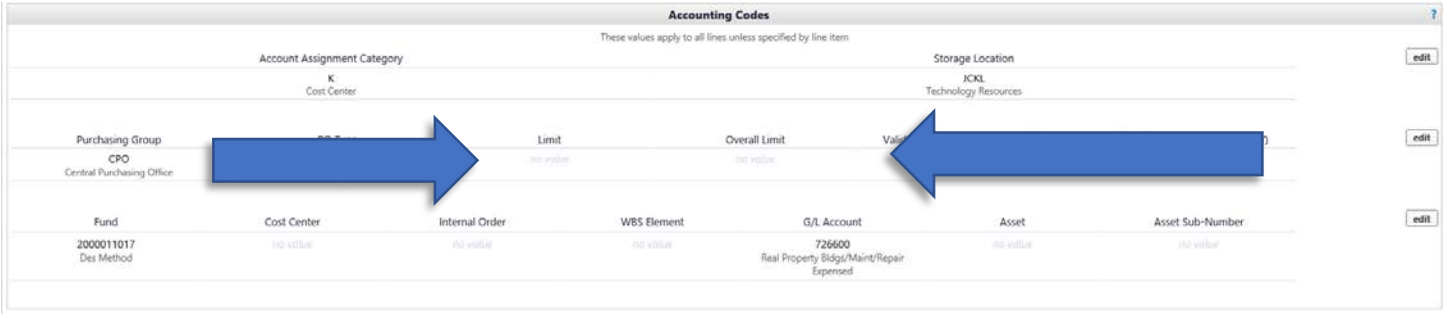
1. Select the correct “Purchasing Group”; CPO for most on campus.
2. Change the “PO Type” to “BCF”;
3. Under “Limit” Select “B” ;
4. Enter a valid start date and end date for the Framework.



Leave “Expected Value” and “Overall Limit” blank.

*****It is critical that the dates are entered as shown in the example MMDDYYYY.**

The framework order will fail and not post into SAP if entered incorrectly.***



<u>Step 5:</u> Click “Save” after all the data in the “Header Accounting Codes” is entered correctly.

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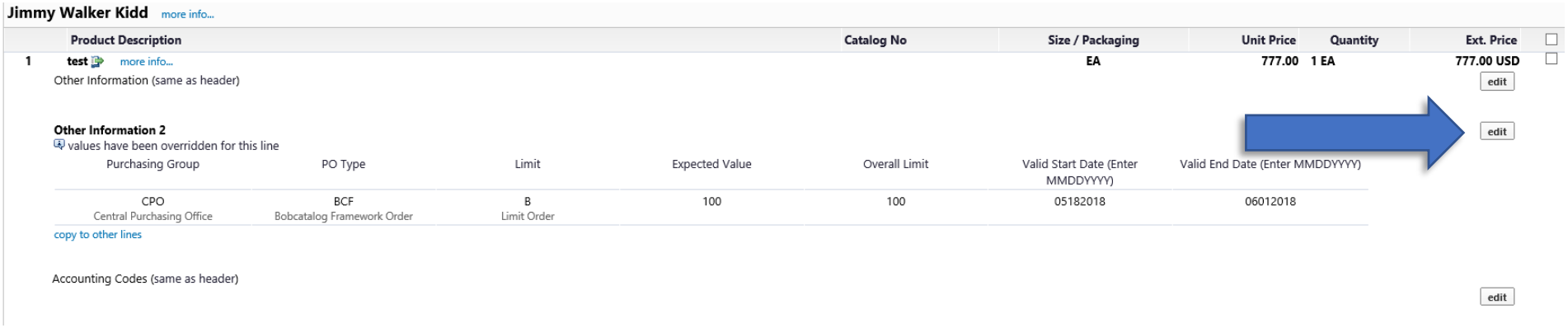
Step 6: Make sure that for each line, you click “edit” and type in your expected value and overall limit. To set the “Expected Value” and “Overall Limit” for each line, make sure the “Accounting Codes” tab is selected; scroll down to the “Product Description” section; then under “Other Information 2” line, select “edit” on the right-hand side.



Jimmy Walker Kidd more info...

	Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1	**test** more info...		**EA**	**777.00**	**1 EA**	**777.00 USD**

Other Information (same as header) edit

Other Information 2 edit

values have been overridden for this line

Purchasing Group	PO Type	Limit	Expected Value	Overall Limit	Valid Start Date (Enter MMDDYYYY)	Valid End Date (Enter MMDDYYYY)
CPO Central Purchasing Office	BCF Bobcatalog Framework Order	B Limit Order	100	100	05182018	06012018

copy to other lines

Accounting Codes (same as header) edit

6A) The “Other Information 2” Pop-Up box will appear, enter the “Expected Value” and “Overall Limit” for that specific line and press “Save.” Do this for each and every line on the requisition.

Other Information 2

Purchasing Group	PO Type	Limit	Expected Value	Overall Limit	Valid Start Date (Enter MMDDYYYY)	Valid End Date (Enter MMDDYYYY)
CPO Central Purchasing Office	BCF Bobcatalog Framework Order	B	100	100	05182018	06012018

Save Cancel

6B) To edit the next line item, scroll down to the next line and click “edit,” enter the information, and click “save.”

Jimmy Walker Kidd more info...

	Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1	**test** more info...		**EA**	**777.00**	**1 EA**	**777.00 USD**

Other Information (same as header) edit

Other Information 2 edit

values have been overridden for this line

Purchasing Group	PO Type	Limit	Expected Value	Overall Limit	Valid Start Date (Enter MMDDYYYY)	Valid End Date (Enter MMDDYYYY)
CPO Central Purchasing Office	BCF Bobcatalog Framework Order	B Limit Order	100	100	05182018	06012018

copy to other lines

Accounting Codes (same as header) edit

	Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
2	**thejykyuy** more info...		**EA**	**852.00**	**1 EA**	**852.00 USD**

Other Information (same as header) edit

Other Information 2 edit

values have been overridden for this line

Purchasing Group	PO Type	Limit	Expected Value	Overall Limit	Valid Start Date (Enter MMDDYYYY)	Valid End Date (Enter MMDDYYYY)
CPO Central Purchasing Office	BCF Bobcatalog Framework Order	B Limit Order	7777	7777	05182018	06012018

copy to other lines

Accounting Codes (same as header) edit

Step 7: Review the “Accounting Code” section to ensure the correct values are entered for the framework values and the account assignment values. Click the “Final Review” tab and then click “Place Order” or “Assign Cart” as is applicable. If not a requisitioner, only the “Assign Cart” button will be available to assign the cart to an authorized requisitioner. Once the cart is placed into order, the requisition will go through the standard workflow for approvals. After approvals, the order is sent to the vendor and imported into SAP. Login into SAP and view the framework order.

This ends the job aid for building a framework order in the Marketplace. For further questions, please contact the Office of Sourcing and Procurement via phone at 245-2521 or by email purchasing@txstate.edu.