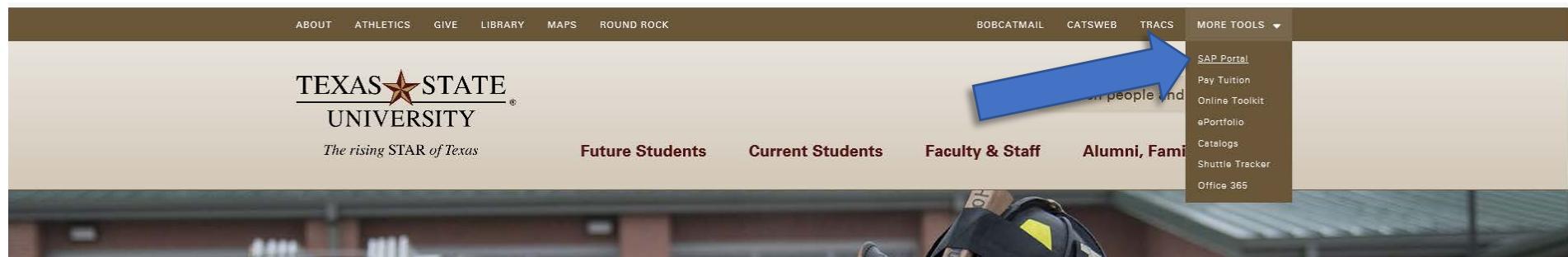


Creating A Limit Framework PO in the Marketplace

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”

A screenshot of the SAP Welcome screen. At the top, there are links for Welcome, Worklist, SAP Easy Access, SAP Employee Self-Service, SAP Fiori Apps, Other Self-Service, Training, and TSUS Marketplace. A blue arrow points from the text above to the TSUS Marketplace link. Below the header, it says "Welcome to the Finance & Human Resource Information System - The online doorway to SAP Financial and HR tools". There's also a "NEWS FLASH!" button and a "Training and Development Reminder" message.

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

The screenshot shows the TSUS Marketplace homepage. On the left, there is a vertical sidebar with icons for Home, Shop, Documents, Contracts, Accounts Payable, Sourcing, and Reporting. The main content area features the TSUS Marketplace logo and a search bar with the placeholder "Shop Everything". Below the search bar, there are links for "advanced search", "favorites", "items", "non-catalog item", "quick order", and "Browse: suppliers | categories | contracts | chemicals". A large blue arrow points to the "non-catalog item" link. The page is divided into sections for Science and Technology, each containing logos and names of various suppliers like Fisher Scientific, Sigma-Aldrich, ThermoFisher, Airgas, Dell, Abacus, and B&H.

THE TEXAS STATE UNIVERSITY SYSTEM **TSUS Marketplace**

Shop > Shopping > Shopping Home > Home/Shop

Shop Everything Go

Go to: advanced search | favorites | items | **non-catalog item** | quick order Browse: suppliers | categories | contracts | chemicals

Welcome to the TSUS Marketplace!
www.txstate.edu/gao/purchasing/

STAPLES

Need a new office chair?
You can now schedule a day and time to demo chairs from Staples to help with your decision making. A showroom of chairs has been set up in JCK 512. Please contact our front office at 5-2521 to schedule a day and time to demo the chairs.

Science

Fisher Scientific Possible Missions-HUB

SIGMA-ALDRICH

ThermoFisher SCIENTIFIC formerly Life Science Lab Supplies

Airgas/ C

Technology

DELL Dell/ Summus HUB

ABACUS Printers-HUB

B&H Photography Equip & Supplies

CDI

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.

The image displays two side-by-side screenshots of a software application's "Non-Catalog Item" dialog box. Both windows have a title bar "Non-Catalog Item" and standard window controls (minimize, maximize, close).

Left Window (Initial State):

- Supplier:** An input field labeled "Enter Supplier" with a placeholder "or Supplier Search".
- Product Details:** A table with columns: Product Description, Catalog No., Quantity, Price Estimate, and Packaging. The "Packaging" dropdown is set to "EA".
- Character Counter:** Shows "254 characters remaining".
- Product Details Section:** Contains a list of checkboxes for various product characteristics, including "Controlled substance", "Recycled", "Hazardous material", "Radioactive", "Rad Minor", "Select Agent", "Toxin", "Energy Star", and "Green".
- Buttons:** "Save and Close" (highlighted in blue), "Save and Add Another", and "Close".

Right Window (After Supplier Selection):

- Supplier:** The supplier "Jimmy Walker Kidd" is listed with a link to "select different supplier".
- Distribution Methods:** A section header with a plus sign.
- Product Details:** The table now includes a row for the entered product: "This is a test" in the Product Description, "1" in Quantity, "150.00" in Price Estimate, and "EA" in Packaging.
- Character Counter:** Shows "240 characters remaining".
- Product Details Section:** The same list of checkboxes as the left window.
- Buttons:** "Save and Close" (highlighted in blue), "Save and Add Another", and "Close".

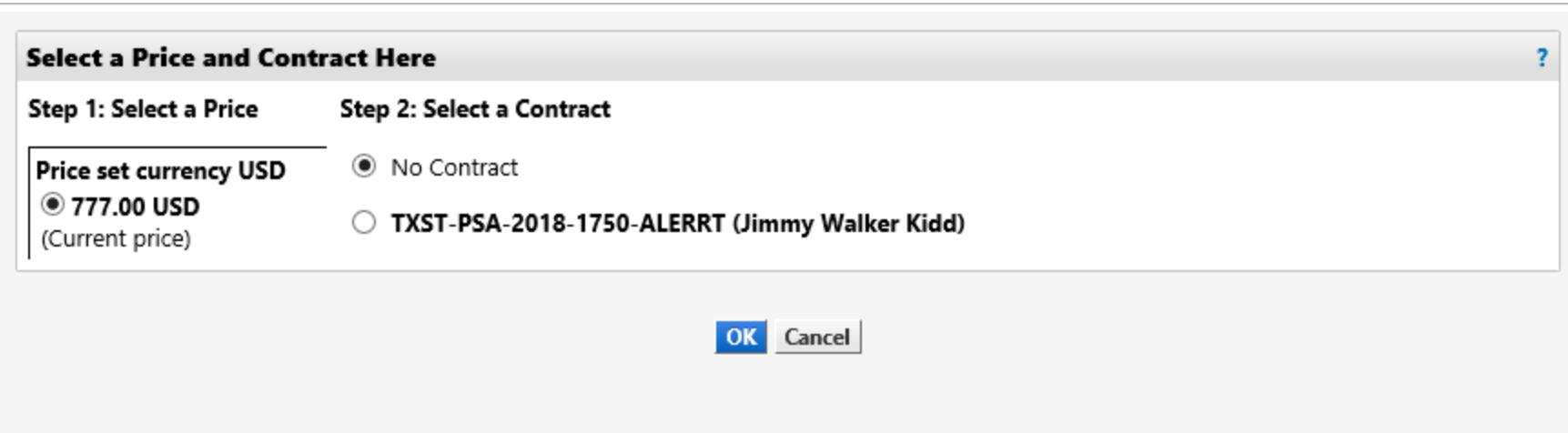
A large blue arrow points from the left window to the right window, indicating the progression from entering a supplier to entering product details.

Step 3: Go to top right-hand corner of the screen and click the ‘cart’ icon and then click “View My Cart”

The screenshot shows a user profile at the top left with the name "Taylor Sullivan" and icons for star, flag, and bell. To the right is a shopping cart icon with the text "150.00 USD". A search bar with placeholder "Search (Alt+Q)" and a magnifying glass icon is on the far right. Below this is a blue header bar with "My Cart" on the left and the date "2018-05-16 TLS269 01" on the right. The main content area displays a single item: "This is a test" with a quantity of "1" and a price of "150.00 USD". To the right of the item are two buttons: "View My Cart" (gray) and "Checkout" (blue). A large blue arrow points from the text "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." to the "Checkout" button.

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.

The image contains two separate sections, each representing a user profile. The top section is for "Jimmy Walker Kidd" and the bottom section is for "thejkyuy". Both sections have a "Product Description" header followed by a "test" entry with a green file icon. Under "Contract", both show "None selected" and a link "choose contract...". Under "Commodity Code", both have an input field and a magnifying glass search icon. The bottom section also includes links "TXST-PSA-2018-1750-ALERRT more info...", "Jimmy Walker Kidd change...", and "copy to other lines...".



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”

THE TEXAS STATE UNIVERSITY SYSTEM **TSUS Marketplace**

Taylor Sullivan ▾ ★ 🔍 150.00 USD Search (Alt+Q)

Shop > My Carts and Orders > Open My Active Shopping Cart ▾ > Cart - Draft Requisition

Logout

Shopping Cart

Name this cart: 2018-05-16 TLS269 01

Continue Shopping

1 Item(s) for a total of **150.00 USD**
subtotal: 150.00 USD
estimated tax, shipping & handling: 0.00 USD

Proceed to Checkout or **Assign Cart**

Have you made changes?

Jimmy Walker Kidd [more info...](#)

Product Description **Unit Price** **Quantity** **Total**

Product Description	Unit Price	Quantity	Total
This is a test	150.00 USD	1	150.00 USD
Contract TXST-PSA-2018-1750-ALERRT more info...	EA		0.00 USD
Jimmy Walker Kidd change...	Shipping		0.00 USD
Commodity Code <input type="text"/> <input type="button" value=""/>	Handling		
	<input type="button" value="Update"/> <input type="button" value="More Actions"/> <input type="button" value="Supplier subtotal 150.00 USD"/>		

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

The screenshot shows the TSUS Marketplace requisition page. At the top, there are tabs for General, Shipping, Billing, Accounting Codes, Internal Notes and Attachments, External Notes and Attachments, Purchasing Use Only, and Final Review. A blue arrow points down to the Accounting Codes tab, which is currently selected. Another blue arrow points down to the "Header Accounting Codes" section. This section contains a yellow warning box with the text: "Almost ready to go! The list below needs to be addressed before the request can be submitted." It lists two required fields: "Account Assignment Category" and "Storage Location". Below this, there is a table with columns for Purchasing Group, PO Type, Limit, Expected Value, Overall Limit, Valid Start Date, and Valid End Date. The table shows data for CPO Central Purchasing Office, BCF Bobcatalog Framework Order, and a limit of 8. The "Header Accounting Codes" section is shown below, with rows for Fund, Cost Center, Internal Order, WBS Element, G/L Account, Asset, and Asset Sub-Number. The "Fund" row (2000011018 Des Method) and the "Cost Center" row (1040000035 Fire Station Lease) are highlighted with red boxes. The "G/L Account" row (726600 Real Property Bldgs/Maint/Repair Expensed) is also highlighted with a red box. The "Internal Order" row has "no value" listed. The "WBS Element" row has "no value" listed. The "Asset" and "Asset Sub-Number" rows both have "no value" listed.

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	8 Limit Order	no value	no value	05182018	06012018

Fund	Cost Center	Internal Order	WBS Element	G/L Account	Asset	Asset Sub-Number
2000011018 Des Method	1040000035 Fire Station Lease	no value	no value	726600 Real Property Bldgs/Maint/Repair Expensed	no value	no value

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.

The screenshot shows the 'Other Information 2' dialog box. It contains the following fields:

- Purchasing Group: CPO
- PO Type: BCF
- Limit: B
- Expected Value: (Blank)
- Overall Limit: (Blank)
- Valid Start Date: 05182018
- Valid End Date: 06012018

At the bottom are 'Save' and 'Cancel' buttons.

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.***

The screenshot shows the 'Accounting Codes' dialog box. It contains the following fields:

- Account Assignment Category: K Cost Center
- Storage Location: JOKL Technology Resources
- Purchasing Group: CPO
- Cost Center: (No value)
- Internal Order: (No value)
- WBS Element: (No value)
- G/L Account: 726600 Real Property Bldgs/Maint/Repair Expensed
- Asset: (No value)
- Asset Sub-Number: (No value)

Two large blue arrows point from the 'Purchasing Group' field to the 'Value' field and from the 'Value' field back to the 'Purchasing Group' field.

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



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.

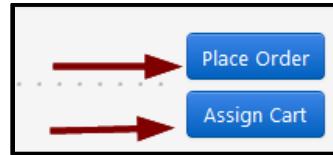
Product Description		Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	
1	test more info...		EA	777.00	1 EA	777.00 USD	<input type="checkbox"/>
Other Information (same as header)							
Other Information 2							
values have been overridden for this line							
Purchasing Group	PO Type	Limit	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	edit
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.

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	<input checked="" type="checkbox"/> B	100	100	05182018	06012018

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

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.