



# Call-Off Orders

The University's iProcurement system does not have direct support for advanced order types such as blanket purchase agreements, planned orders and scheduled releases. However, these types of orders can be replicated in-part by creating non-catalog requests with the item type set to "Goods or services billed by amount".



Note: This will place a commitment against the charge account or grant specified during checkout.

Examples of such orders might include:

- A contract for 12-months of IT support to be invoiced on a monthly basis
  - The purchase order is raised for the whole value of the contract.
  - The supplier would invoice on a monthly basis for 1/12<sup>th</sup> the value of the contract.
  - The requisitioner would create a receipt once a month for the value of the invoice.
  
- An order for £1000 worth of diagnostic testing, to be invoiced as each diagnostic test is requested.
  - The purchase order is raised and approved for the whole value of the order.
  - Users will request diagnostic testing on a piecemeal basis (where each diagnostic test costs just a fraction of the whole order value) up to the total value of the original order.
  - The supplier will invoice as tests are provided.
  - Users will receipt in iProcurement as their diagnostic tests are performed.
  - Invoices are paid.

In the first example, an order is raised for a 12-month service contract thus creating a commitment in our accounts however; we have not had to pay for the whole contract in advance.

In the second example, an order is raised and approved to provide a total value of a product or service. Typically this would be used where low-value items or services are frequently requested and the overhead to approve many small orders would be impractical.

## Raising the order

When raising these orders change the *Item Type* to **Goods or services billed by amount**.

The screenshot shows the 'Non-Catalog Request' form in the iProcurement system. The 'Item Type' dropdown menu is open, showing 'Goods or services billed by amount' selected. The 'Item Description' is '12 months support contract (billed monthly)'. The 'Category' is 'KHE', 'Amount' is '1800', and 'Currency' is 'GBP'. The 'Supplier Name' is 'SPECIALIST COMPUT X' and the 'Site' is 'BIRMINGHAM'. There are buttons for 'Clear All', 'Add to Cart', and 'Add to Favorites' at the top and bottom of the form. A 'Shopping Cart' notification on the right says 'Your cart is empty.'

The **Amount** field should then be the total monetary value of the order. The process for adding to cart remains the same.

## Checking out

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When checking out, the quantity will be the monetary amount, the price will show as £1 and the amount field will be the total monetary value of that service/item.

The screenshot shows a 'Shopping Cart' interface with a navigation bar at the top containing 'Shop', 'Requisitions', and 'Receiving'. Below the navigation bar, the title 'Shopping Cart' is displayed. On the right side, there are two buttons: 'Save Cart' and 'Checkout'. The main content area contains a table with the following data:

Line	Item Description	Unit	Quantity	Price	Amount (GBP)	Delete
1	12 month maintenar	EA	1800	1 GBP	1,800.00	
<b>Total</b>					<b>1,800.00</b>	

Below the table, there is a button labeled 'Return to Shopping'. At the bottom right of the interface, there are two buttons: 'Save Cart' and 'Checkout'.

## Receipting and returning

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Refer to separate 'Receipting and Returning' guidance on receipting against call-off orders.