



University of California
Berkeley



20/30 Webinar Series: #6 Receiving in BearBuy.

Why Everyone Should Be Doing It!

Agenda

1. About this Session

2. Receiving

- Policy
- Physical Receiving
- Online/Electronic Receiving
- Added Benefits

3. Resources & Support

4. Question and Answer

About this Session

- All users
- 30 Minutes
- Receiving
- Question and Answer

About the Non-Catalog Form

15
min

Q&A

15
min

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Receiving



Policy

Accounting officers, heads of departments, and other appropriate campus or Office of the President administrative officers are responsible for retaining the substantiating documents cited AM-A000-7:Official Documentation Required in Support of University Financial Transactions policy. Documents are to be retained for use by internal, external, and governmental auditors for the periods of retention specified in the University Records Disposition Schedules Manual.

Section II.A: <http://policy.ucop.edu/doc/3410183/AM-A000-7>

Physical Receiving

Policy states that “Evidence of receipt of goods or services either in the form of a departmental approval or receipt certification upon the invoice or in the form of a receiving report.”

The receipt certification is taken as indication that the quantity received and accepted is the quantity ordered or desired by the user department.

Physical receiving refers to the acceptance of physical goods and services with the collection of the packing-slip or any documentation supporting the delivery of the good/service. Physical receiving varies by department on campus.

- Some perform central receiving where packages are sent to a central location and re-distributed.
- Other departments perform un-centralized receiving where packages are delivered to individuals directly from the carrier.

Online/Electronic Receiving

Online/Electronic receiving refers to performing the 'receiving' action in BearBuy. It refers to creating a cost or quantity receipt in BearBuy after the acceptance of physical goods and services. Collection of the packing-slip or any documentation supporting the delivery of the good/service is still required.

Online/Electronic receiving, like physical receiving, varies by department on campus:

- Some perform central receiving where packages are sent to a central location, received in BearBuy and then re-distributed.
- Other departments perform un-centralized receiving where packages are delivered to individuals directly from the carrier and the individual creates the receipt in BearBuy

Added Benefits

There are lots of added benefits when receiving online/electronically:

- Documentation retention remains in BearBuy
 - No need to file paper documents
 - Documents are readily available when any University official needs it
 - Fulfills documentation policy requirements listed by UCOP
- Creates added transparency
 - When receipts are created in BearBuy, date of creation, items received, packing slip, links, comments, and name of receiver are listed.
 - When large POs are put in place and a receipt is created, remaining amount/quantity pending receiving updates automatically in BearBuy
 - Accessibility to all associated transactions (original cart/req, PO, vouchers and other receipts)

How To Create Receipts in BearBuy

We have of step-by-step demo videos that go over receiving online/electronically:

- Creating Cost Receipts in BearBuy Demo
 - Demo goes over creating a cost (amount) receipt, editing and deleting existing cost receipts
 - <https://www.youtube.com/watch?v=zOEYQ3KBcU4>
- Creating Cost Receipts in BearBuy Demo
 - Demo goes over creating a cost (amount) receipt, editing and deleting existing cost receipts
 - <https://www.youtube.com/watch?v=9bPHAIWgFYg>

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RESOURCES & SUPPORT



Training Resources

- The BearBuy website is the source for the most up to date news, announcements and training resources
 - procurement.berkeley.edu/bearbuy
- BearBuy YouTube Channel
 - youtube.com/user/BearBuyProcurement
- Need more assistance? Contact the BearBuy help desk!
 - (510) 664-9000 Option 1, Option 2, Option 1
 - Mon-Fri 8 AM to 5PM
 - [Email BearBuy Help](mailto:bearbuyhelp@berkeley.edu) (bearbuyhelp@berkeley.edu)

Questions and Answers!

