

Shopping

Accessing BearBuy

- 1. Login to <u>blu.is.berkeley.edu</u>.
- 2. Select Finance from the top left section of the page.
- 3. From the loaded page, click BearBuy.

Home/Shop Page Catalog and Forms Organization

Catalogs are organized in categories on the Home/Shop page.



Shop From The Top

1. Use Shop>Everything to begin shopping catalog items. Enter the applicable search items and click Go.



2. The search results page Filters on the left, can reduce the number of results. You can filter by Supplier, Manufacturer, Unit of Measure, etc.

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- 3. Edit the quantity to desired and click Add to Cart **v** Continue adding items to your cart.
- 4. To access the Shopping Cart after adding a line item, select the Cart icon on the top right banner. From there you can View My Cart or Checkout.

ion Items | Notifications 📜 168.48 USD 🔍

Shopping in a Hosted Catalog

- 1. Navigate to and click the hosted catalog sticker. A search bar should appear.
- 2. Enter the applicable search items and click Search.



3. The search results page lists available Filters on the left.

Add Keywords ?	Results per page 20 •	Sort by: Best Match +	* Page 1 * of 200 * ?
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E & K SCIENTIFIC PRODUCTS INC. Q	Q		
USA SCIENTIFIC INC Q	TURF TEST SML 12 X 75	MM PS CONICAL BOTTOM NON-STERILE 250/ BAG 200	10.22

- 4. Edit the quantity to desired and click Add to Cart 🔽 Continue adding items to your cart.
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tion Items 🛛 Notifications 📜 168.48 USD 🔍

Shop in a Punch-Out Catalog

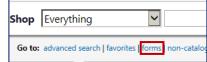
When you shop a **Punch-Out Catalog**, the catalog "punches-out" or connects to the supplier's UCB specific website. When the Shopper "checks out" of the punch-out catalog, the products are returned to BearBuy and added to the active BearBuy Shopping Cart.

- 1. In BearBuy, click the Supplier's Catalog sticker.
- 2. Search in the supplier's catalog for items and add them to the Supplier's shopping Cart.
- 3. Continue shopping and when ready "check-out" from the punch-out site. The item(s) will be added to the BearBuy Shopping Cart.
- 4. Complete the BearBuy shopping process.

Forms

Use forms when needing to purchase goods/services not found in the catalog.

1. Access forms beneath the product search bar. Locate the form you wish to use.



- 2. Complete all the required information (indicated in bold on the form).
- 3. Select Add and go to Cart from the Available Actions drop down menu.
- 4. Click Go to return to the Shopping Cart.



Updating/Editing Shopping Cart Items

1. After adding items to your Shopping Cart, select the appropriate line item by checking the line checkbox (☑).

▼ Go

2. You can also select Add To Favorites, Remove Selected Items, Move To Another Cart or other options from the dropdown options

For selected line items Add To Favorites





Shopping

Assign a Shopping Cart

When a Shopping Cart is routed to another Shopper (e.g. a programmatic manager, PI, etc) for authorization, prior to the creation of the Requisition, the recipient is referred to as the 'Cart Authorizer'.

- 1. From either the View My Cart or Checkout window, select Assign Cart . You'll have to search and select the desired Cart Authorizer.
- 2. You can also enter a comment for the Cart Authorizer if needed.
- 3. Click Assign. BearBuy sends an email notification to the cart authorizer.



Submit a Shopping Cart

The departmental Org Node is the only required field that must be completed in order for the cart to be submitted. The Cart is routed in BearBuy workflow based on the Org Node.

- 1. Click View Cart Details.
- 2. On the **Summary** tab, scroll down to the **Org Node** section. Click **edit** and select a Profile Value or search and select from all Berkeley Org Nodes.
- 3. Once the Ora Node is selected. click Submit when the Cart is ready to be submitted.



Unassigning a Shopping Cart

Assigned Carts can be unassigned if you need to make changes to the Shopping Cart or if you need to change whom you assigned it to. Submitted Carts <u>cannot</u> be "Unassigned".

Shopping	My Carts and Orders
Carts and Orders	Open My Active Shopping Cart
	View Draft Shopping Carts
Admin	View My Orders (Last 90 Days)

- 1. Navigate to Shop > My Carts and Orders > View Draft Shopping Carts.
- 2. Under the header My Drafts Assigned to Others, click Unassign. The Cart will be returned to your Draft Carts list.

Status of your Cart/Requisition

You can see the status of any Carts you have submitted.

1. Navigate to Shop > My Carts and Orders >View My Orders. On the resulting page, you will see the Carts you have processed in the last 90 days.

Favorites

Only hosted and form items are eligible to be added as Favorites. To add new favorites:

- 1. Select the item desired and click Add To Favorites.
- 2. Select Destination Folder o Rew from the pop-up window and click Submit. A message will appear noting the product has been added to the folder.
- 3. Click Close.

To view existing favorites:

- 1. Navigate to Shop > Go To > View Favorites menu.
- 2. Within your favorites you can edit your favorite's folder.

Copy an Order (Cart)

Shopper can copy any previously submitted cart/order.

1. Navigate to the Shop > My Carts and Orders > View My Orders (Last 90 Days) list.

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	Shopping	My Carts and Orders
A	_My Carts and Orders	Open My Active Shopping Cart
Ш Э	B Admin	View Draft Shopping Carts View My Orders (Last 90 Days)

2. Select the **Requisition number** of the transaction you wish to copy. Expand date filter if <u>needed</u>.

Search Terms	Results Per Page 50	0 🗸	Sort by:
Prepared For Carla Prado	Requisition No.	Supplier(s)	Rec
Filtered by Type: Requisitions	✓ 59339443 🖄	GIVE SOMETHING BACK OFFICE MAX	4th Street Staff S
Date Range: Last 90 days	✓ 58194947 🔍 🖲	BluCard Tracking	Tableau Mainten
Save Search Export Search	✓ 58485051 🕰 🖲	PRADO, CARLA S.	Out of pocket ex T&E)
Refine Search Results ?	✓ 58481233 🖏	Campus Shared Services	BTB Light Refrest request
Date Range	✓ 57428788 [®]	Campus Shared Services	\$122.67 TRV for

3. From Available Actions, select Copy to New Cart, and press Go

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	Shippir	ng	?		Billing	1
Ship To			Bill To			
Attn: Leslie Siegmund 1608 4th Street Suite 101 Parking Lot Entrance			For inquiries: disburse@berkeley.edu See instructions to e-mail invoices as attachments at			

4. The cart has been successfully copied. Continue the shopping process.

For more shopping guidance, you can find the following job aids on the <u>BearBuy</u> <u>Instructional Resources webpage</u>.