New Shoppers Quick Reference Guide

For more information and training resources, please see the BearBuy website.

Please Note: Purchase Orders must be issued before goods or services can be ordered or paid.

Login to BearBuy using your credentials: bearbuy.is.berkeley.edu or blu.is.berkeley.edu then select BearBuy.

Default User Settings

Custom Field and Accounting Code Defaults:

- After clicking your user icon located at the upper right hand corner and View My Profile, select Default User Settings and then one of the following:
  - Custom Field and Accounting Code Defaults to set up your Chartstring and Org Node. Please use the Code Favorites tab to add your Accounting Codes and Org Node.
  - Default Addresses to set up your default ship to and bill to addresses.
    - Ship to Address = Your Physical Address
    - Bill to Address = Disbursements
  - You can also assign a default Cart Assignee if necessary.

Notification Preferences:

- After clicking your user icon located at the upper right hand corner and View My Profile, select Notification Preferences.
  - Select the type of notification preference you would like to edit. Click Edit Selection located at the upper right hand corner and select Override. Then, choose the preference of your choice from the dropdown list and save.

Helpful Hints:

- Save time whenever you purchase by configuring your Default User Settings! 😊
- If you do not know your Chartstring/Org Node, please contact your department’s manager or financial analyst.
- You can have multiple favorite shipping addresses and chartstrings, but only one can be set as your default.
- Account Code (Chartstring) – provides necessary information to where the expenses should be charged.
  - Chartstrings can be managed at two different levels:
    - Header Level is applied to all lines of the requisition by default.
    - Line Level is applied to lines accordingly and will always supersede header level information.
- Org Node – your associated campus organizational unit that is often used for assigning systems permissions and for routing transactions.
- Default Addresses – if you do not have a physical ship to address, use your building name and room number.
- Cart Assignees – your optional department assigned shopper with authorization to complete your purchase and access to chartstring.
- Speed Type – please leave this field blank if you were not provided with one.

Shopping

Catalogs:

- Hosted catalogs are managed internally by the Supply Chain Management (SCM) BearBuy team.
  - Perform a quick product search using the Catalog Search Bar. You can also use the links listed below the search bar accordingly.

- Punchout catalogs are managed externally by the Supplier. A new browser window will open when a punchout catalog is selected. After adding and submitting items in your Cart from the punchout catalog, you will be redirected to BearBuy to complete your transaction.

Helpful Hint: When using a tile that has both a hosted and punchout catalog, use the punchout catalog instead since it has more of a selection.

Forms: Forms are used for purchases that are not found in a catalog. For a full list of forms in BearBuy, select the Forms link located under the Catalog Search Bar.
Filter Search Results, Product Comparison, and Favorite Item:

- Upon searching for your product using the catalog search bar, you can filter the results to your liking using the section on the left hand side of the page. You can also use the comparison feature on the right hand side to compare multiple results.
- Click add to favorite if you want to create a favorites list for items that you frequently purchase.

Helpful Hint: For easier viewing purposes, comparing no more than 4 items at a time is recommended.

Cart Management

- On the left hand side of the page, click Shop and then My Carts and Orders. Click the View Carts section to view your Draft Carts and Assigned Carts.
- Once in your cart, you can do the following:
  - Add Selected Items to Favorites
  - Remove All or Selected Items
  - Move Items to Another Cart
  - Add Items to Draft Cart or Pending Purchase Requisition/Purchase Order (PO)

Helpful Hints:
- View my Carts is the only time you may be able to set your cart as Urgent.
- Always view your cart details in order to verify completion and before submitting or assigning your cart.
  - Important: Orders must have ship to/bill to addresses and chartstrings to process.
  - It is best practice to never mix forms/catalogs (i.e. Non-Catalog and Payment Request, Dell and CDW-G, Amazon Business and Service Order Request, etc.) in a cart.

Use the following tabs in your Requisition or PO to view specific information:
- Approvals to view your Requisition/PO’s current status in the workflow.
- Comments to view any communication between your Requisition/PO’s stakeholders. Show comments for all is recommended.
- Attachments to view all attachments/supporting documentation such as quotes from the supplier.
  - Please do not include any personal/sensitive information in your attachments! (i.e. Social Security Number, Credit Card Information, Driver’s License, State ID Card, etc.)
  - More information on Restricted Data: https://security.berkeley.edu/what-restricted-data
- History to view all past actions associated to your Requisition/PO.

Receiving

Creating a Receipt(s)
- For Catalog Orders >$5,000 and Non-Catalog Form Orders >$1,000 a receipt is required before a voucher can be paid.
- Please see the Receiving Instructions: https://supplychain.berkeley.edu/receiving-instructions

Support

First Line of Support: BearBuy Help Desk
- Available Mon. – Fri. from 8AM to 5PM, Phone: 510-664-9000 Option 1, Option 2
- Email: bearbuyhelp@berkeley.edu

Regional Group Purchasing Inquiries: https://portal.berkeley.edu/regions

Invoice Inquiries: https://controller.berkeley.edu/financial-operations/accounts-payable/helpful-hints-our-vendors

Inquiries for High Value Goods and Services over $10,000: https://supplychain.berkeley.edu/procurement/contact-your-buyer