

New Shoppers Quick Reference Guide


For more information and training resources, please see the [BearBuy website](#).

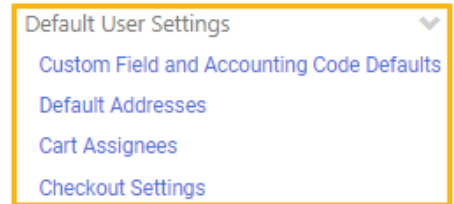
Please Note: Purchase Orders must be issued before goods or services can be ordered or paid.

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.



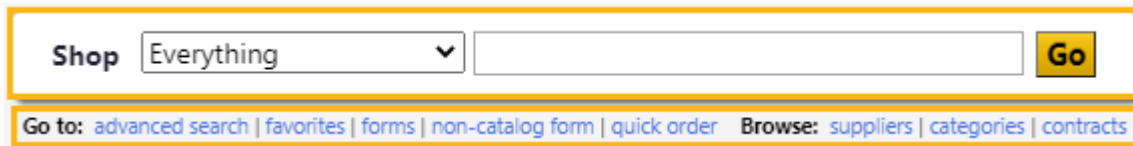
Helpful Hints:

- 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.



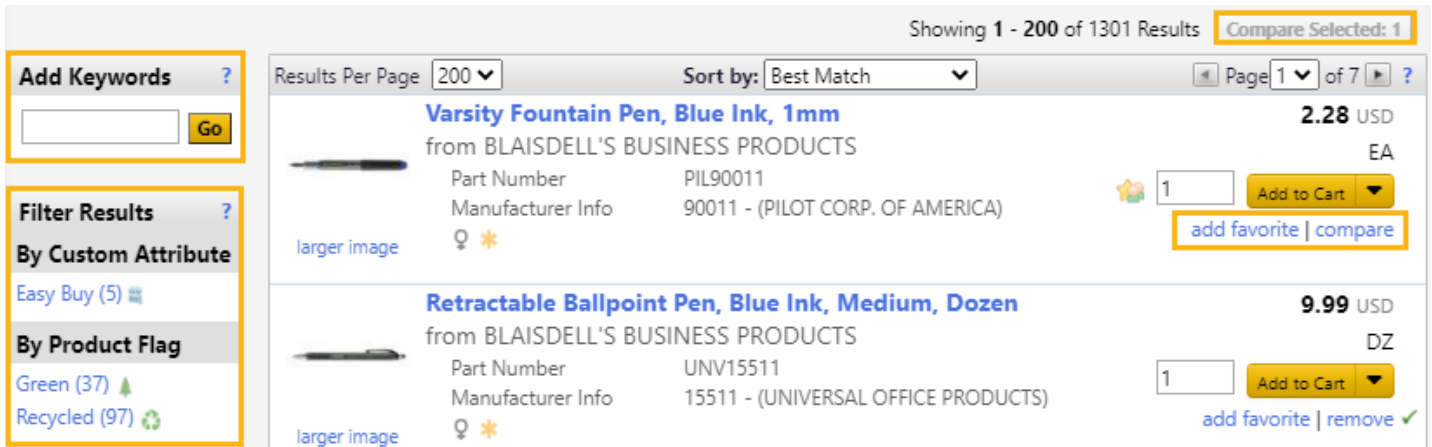
- **Punchout catalogs** are managed externally by the Supplier. A new browser window will open when a punchout catalog is selected. After adding and submitting items in your Cart from the punchout catalog, you will be redirected to BearBuy to complete your transaction.

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)

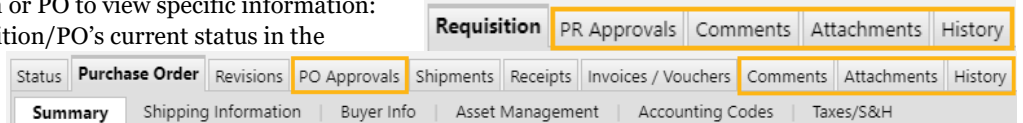


Helpful Hints:

- **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*.

Tabs

- 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>