New Shoppers Quick Start 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.

Custom Field and Accounting Code Defaults:
- After clicking your name 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.

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.

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.

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.
**Product Comparison:**
- Upon searching for your product, 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.

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

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**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 (i.e. Non-Catalog and Payment Request).

**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](https://security.berkeley.edu/what-restricted-data)
  - **History** to view all past actions associated to your Requisition/PO.

**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](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](https://portal.berkeley.edu/regions)
- **Invoice Inquiries:** [https://controller.berkeley.edu/financial-operations/accounts-payable/helpful-hints-our-vendors](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](https://supplychain.berkeley.edu/procurement/contact-your-buyer)