20/30 Webinar Series: #13
Researching Your Previously Placed Orders
Agenda

1. About this Session
2. Researching Previously Placed orders
   - Access Submitted Carts
   - View Approval Status
   - View Associated PO/Voucher(s)/Receipt(s)
   - View Supplier Related Information
3. Resources & Support
4. Question and Answer
About this Session

• Shoppers
• 30 Minutes
• Researching Placed Orders
• Question and Answer

Researching Placed Orders

15 min

Q&A

15 min
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Researching Previously Placed Orders
Access Submitted Carts

Once your cart has been submitted, the cart is no longer listed within the View My Draft Cart section. So where did it go?

Navigate to Shop > My Carts and Orders > View My Orders (Last 90 Days)

You’re able to:

• Carts you’ve submitted within the last 90 days
• Filter your list down to locate a specific transaction if you have a large ‘outbox’.
• Access the requisition, Purchase Order(s), receipt(s), and voucher(s)
Access Submitted Carts

LIVE DEMO
View Approval Status

Once a cart is submitted it is then called a Requisition (a request to purchase). All Requisitions don’t require the same approvals in BearBuy (i.e. Payment Request form vs Catalog purchase ~$100).

Each transaction (Requisition, Purchase Order and Voucher) has a tab within the transaction that details the visual workflow. This is extremely helpful when following up on an order that has been pending approval for several days.
View Approval Status

LIVE DEMO
View Associated PO/Voucher(s)/Receipt(s)

All documents related to a transaction are accessible through the Requisition.

Since A Requisition may contain different items from different suppliers, the Purchase Order number associated to each Requisition is listed on the line item detail of the Requisition.

From the Purchase Order, you’ll be able to see any associated Vouchers and receipts.
View Associated PO/Voucher(s)/Receipt(s)

LIVE DEMO
View Supplier Related Information

Once Approvals are completed for a Requisition and a Purchase Order is created for each Supplier* you may experience the Supplier not fulfill the order. There may be several reason why the order is not yet delivered (i.e. weather issues from distribution center, Supplier never received legible copy of PO, etc).

To view Supplier Related Information here’s one of many ways:

From the Requisition
1. Navigate to Shop>My Carts and Orders>View My Orders (Last 90 Days).
2. Select the Requisition you wish to follow up on.
3. Once in the Requisition, select the Purchase Order> Supplier Info sub-tab
4. Next to the Supplier name select the more info.. link

*One Purchase order will be created for each unique supplier in each cart.
View Supplier Related Information

LIVE DEMO
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RESOURCES & SUPPORT
Resources & Support

• The BearBuy website is the source for the most up to date news, announcements and training resources
  – supplychain.berkeley.edu/bearbuy

• BearBuy YouTube Channel - Short demos videos!
  – youtube.com/user/BearBuyProcurement
  – Subscribe to receive notifications when new videos are posted.

• BearBuy Help Desk #1 place to stop for help:
  • (510) 664-9000 Option 1, Option 2
  • Mon-Fri 8 AM to 5PM
  • Email BearBuy Help (bearbuyhelp@berkeley.edu)
Questions?

Please send all related question to bearbuyhelp@berkeley.edu