20/30 Webinar Series:
#9 Examining Different BearBuy Terminology
Agenda

1. About this Session
2. BearBuy Terminology
   - Internal vs External Attachments
   - Supplier Fulfillment vs Remit To Address
   - Hosted vs Punch-Out Catalogs
   - Line vs Header
   - Active vs Draft Cart
3. Resources & Support
4. Question and Answer
About this Session

- All users
- 30 Minutes
- BearBuy Terminology
- Question and Answer
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BearBuy Terminology
Internal vs External Attachments

- Both internal and external attachments are visible in BearBuy to any BearBuy user with the appropriate viewing access.
- Do not upload any document in BearBuy, *unless* private information and the home & family data is blacked out and **completely unreadable**.

**Internal Attachments**
The Internal Attachments section allows attachment of necessary supporting documents. Attachments in this section will not be sent to the supplier.

**External Attachments**
The External Attachments section provides another location for adding supporting documents. Attachments in this section **are** distributed to the supplier via fax or email.
Supplier Fulfillment vs Remit To Address

**Fulfillment Address**
- A fulfillment address (also called an order address) is the supplier specified address that will fulfill the order. Some suppliers have more than one fulfillment address.
- A Shopper or REQ Creator can edit the fulfillment address if more than one exists for a supplier. When processing transactions in BearBuy, Shoppers and REQ Creators will be able to view and edit fulfillment addresses for a supplier.

**Remit To Address**
- A remittance address is where payment for the supplier invoice is sent.
- Accounts Payable will select from the supplier’s remittance addresses when creating the voucher to ensure the payment is sent to the address listed on the supplier invoice. Only Voucher Preparers are able to view and edit the remittance addresses when entering the voucher.
Hosted vs Punch-Out Catalog

**Hosted Catalog**
- Hosted Catalog suppliers provide UCB a price file. The file is then uploaded to BearBuy. These price files contain pictures, descriptions and prices for all negotiated items the supplier carries.
- When users ‘shop from the top’, they are searching hosted catalogs.

**Punch-Out Catalog**
- Punch-Out Catalog suppliers create a UCB custom website containing all products at UC negotiated prices.
- To access a punch-out, click the supplier’s sticker and a new window will open.
- Any punch-out catalog items will not display dollar amounts when ‘shopping from the top.’
Submit vs Assign

**Submitting a Cart**
- Users can click the submit button when the requisition is ready for submission.
- The requisition will be sent to the appropriate step based on the Org Node entered on the cart.
- Once the requisition is submitted, you can check the status at any time using the *View My Orders* link within the Shop menu icon.

**Assigning a Cart**
- Users can click the assign button when the requisition needs to be seen/approved by another individual not on the official workflow.
  - This includes budget officers, Principle investigators, Managers, Budget Managers, etc.
- The individuals who receive these assigned carts are called Cart Authorizers.
- Cart Authorizers can edit the cart before they submit the cart.
Header vs Line

Header
• When the term header is used, it references information at the top level of the transaction.
• Information included in the header level will apply to each individual line as long as the line information is not altered.

Line
• When the term line is used, it references information at the individual line level.
• Changing information at the line level only affects the line in question.
Header vs Line

**Shipping**

- **Ship To**
  - Attn: Carla S Prado, BA
  - 1608 4th Street Suite 101
  - Parking Lot Entrance
  - Berkeley, CA 94710
  - United States

- **Final Destination Code**
  - no value

- **Delivery Options**
  - Expedite
  - Ship Via: Best Carrier-Best Way
  - Requested Delivery
  - no value

**Product Description**

- 100 CALORIE PACK ALL NATURAL ALMONDS, .63OZ PACKS, 7/BOX

**Catalog No**

- DFD34325

**Size / Packaging**

- BX

**Unit Price**

- 3.74 USD

**Quantity**

- 1 BX

**Ext. Price**

- 3.74 USD

**Ship To** (same as header)

**Final Destination (same as header)**

**Delivery Options (same as header)**
Active vs Draft Cart

- Both Active and Draft carts are carts that have not been officially submitted into workflow.
- Once submitted, active/draft carts are called Purchase Requisitions (PR).

**Active Cart**
An active cart is the cart you are currently adding items to and/or editing. BearBuy highlights the active cart so it’s easier to identify the active cart vs draft cart. You can select a new active cart by clicking the cart icon in this column.

**Draft Cart**
A draft cart is a cart you are not currently adding items to and/or editing. These are carts you created but have not submitted yet. You can have multiple draft carts at a time.
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RESOURCES & SUPPORT
Training Resources

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

• BearBuy YouTube Channel
  – youtube.com/user/BearBuyProcurement

• Need more assistance? Contact the BearBuy help desk!
  – (510) 664-9000 Option 1, Option 2
  – Mon-Fri 8 AM to 5PM
  – Email BearBuy Help (bearbuyhelp@berkeley.edu)
Thanks For Watching!