University of California
Berkeley

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

BearBuy Terminology

Q&A

15 min

15 min

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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.

BearBuy

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.'

UC BearBuy

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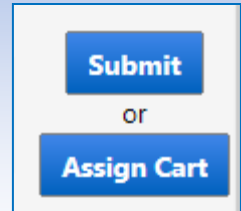
Assigning a Cart
- Users can click the assign button when the requisition needs to be seen/approved by another individual not on the official workflow.
    - This incudes budget officers, Principle investigators, Managers, Budget Managers, etc.
- The individuals who receive these assigned carts are called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

Submit
or
Assign Cart

UC BearBuy

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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

Hide value descriptions

Shipping	?

These values apply to all lines unless specified by line item

Ship To

Shipping address
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

For selected line items | Add To Favorites | Go

GIVE SOMETHING BACK SBE · more info...
001, BFS ID: 0000144927
7730 Pardee Lane, Oakland, CA 94621 US

	Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	☐
1 ✓	100 CALORIE PACK ALL NATURAL ALMONDS, .63OZ PACKS, 7/BOX 📷 more info...	DFD34325	BX	3.74	1 BX	3.74 USD	☐

Ship To (same as header)

Final Destination (same as header)

Delivery Options (same as header)

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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.
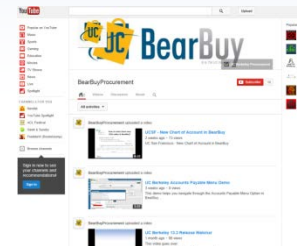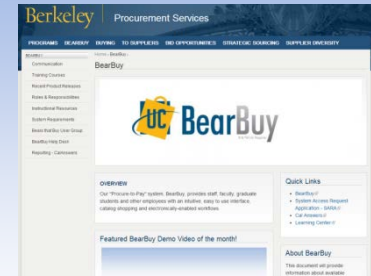
My Drafts		
Active Cart	**Cart Number**	**Shopping Cart Name**
🛒	53731610	2014-08-29 011814427 01
🛒	53726650	TRV for C.Prado

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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!