Shopper Quick Reference

Accessing BearBuy

- Using MyAccess, login and select the BearBuy link.
- On the left side of the BearBuy homepage, review Bulletin Board information for new announcements or training materials.

Ways to Shop

- This section covers Shopping with a Hosted Catalog, Punchouts and Forms.

Shop with a Hosted Catalog

- Use Shop > Everything to search for hosted catalog items from preferred suppliers at University-specific pricing.
- Use Advanced Search options to enter specific criteria including Product Description, Part Number, Supplier and/or Manufacturer Name and Key Word search.

1. Use Shop > Everything to begin Shopping, enter in the applicable search terms, and click the Go button.

2. The search results are shown. On the left-hand side are the Filter Result options. This lets you filter by Supplier, Manufacturer, Unit of Measure and more.

3. In the search results, the list of items is shown. The Product picture (if any), description and other detailed specifications are typically shown.
4. Use the compare link to compare items. Once you have flagged those items to compare, click the Compare Selected button.
5. Click the Add to Cart button to add desired items to your Cart.
6. While searching, add items to your shopping cart from the search results via the Add to Cart button.
7. To access the shopping cart after adding a line item, select the 1 item(s) added, view cart link or the icon (top right corner of page).
8. To continue shopping click the BearBuy logo or home/shop tab.

Shop with Punch-outs

- Punch-out connects to the supplier’s website, branded for UCSF and using our contract pricing. Punch-out sites retains the look and feel of the regular public website, however, the checkout will result in the products being returned to BearBuy and added to the active shopping cart.
- Follow the supplier’s directions for submitting the items back to BearBuy as each suppliers site may differ. Product pricing and availability may vary between the public and University websites.

1. Click the supplier’s icon. Select punch-out to begin the punch-out session.
2. Search in the supplier's catalog for items and add to supplier shopping cart.
3. Complete the shopping selected on supplier’s site, then return item(s) to BearBuy shopping cart.

Forms

- Use Forms to create shopping carts for non-catalog items, Services, Payment Requests, and several other pre-configured business forms.

1. From the Forms section, select the appropriate form. A simple description for the form will be shown if you hold the mouse on the form name.
2. Enter all required information (indicated in bold on the form).
3. Select Add and go to Cart from the drop down menu.
4. Click the Go button to return to the shopping cart.

Updating and Editing Shopping Cart Items

1. After adding items to your shopping cart, select the appropriate line by checking line checkbox.
2. Add to favorites, remove items, or move items to a different cart using the list.
About Favorites

- Add routinely ordered items to a favorites folder for quick re-ordering. Only hosted and form items are eligible to be added as Favorites.

1. Search for items. Select the add favorite link in the search results.
2. Edit the Item Nickname (if needed). The correct product name will display on the requisition and purchase order to the supplier.
3. Select the Destination Folder or New button and click Submit. A message will appear noting the product has been added to the folder.
4. Click the Close button.

Assign Cart

Once you are done shopping, Assign the cart to the desired Requester.
1. Click the Assign Cart button and select the Requester.
2. You can also enter a comment for the Requester if needed.
3. Click the Assign button, and BearBuy sends an email notification of the assigned shopping cart to the requestor.

Reviewing Action Items

- On the left side of the BearBuy homepage, you can review the Action Items section for Requisition status updates such as Pending and Recently Completed.

Status of your Cart

- Before the Cart becomes a Requisition, you can see the status of any Carts you have assigned to your Requester under the Navigation bar, Carts > Draft Carts.

Unassigning Shopping Carts

- Assigned Carts can be unassigned if you need to make changes to the shopping cart or if you need to change the Requester.
  1. Click carts ✐ draft carts on the navigation bar.
  2. Go to My Drafts Assigned to Others section and locate the Cart.
  3. Click the Unassign button. The cart will be returned to your Draft Carts list.

Requisition and Purchase Order History

- All requisitions and purchase orders are permanently stored within BearBuy.
  1. Select history/reports on the navigation bar to search for requisitions, purchase orders, invoices or vouchers.
  2. Select the appropriate tab: PO history | requisition history | my requisitions, etc.
  3. Click the Requisition No., PO No/ or Invoice/Voucher No. to view document summary, detail, and approval history.
  4. You can also filter by Custom Fields appropriate for the document, such as Procurement Dept Code or Accounting Codes such as Fund or Work Order, among others.

Reviewing Your Profile

1. Click the profile link located in the left corner of the page.
2. Click the User Settings tab. Review/edit Email Preferences.
3. If you will be adding purchasing info such as accounting codes or ship to details, click the Purchasing tab. Review/edit Bill To and Shipping Addresses, Procurement Dept Code defaults and accounting code defaults, such as Fund, DPA and NCA. Some fields are view only and can only be updated from PeopleSoft. Click the Save button.

Proceed to Checkout

- Clicking Proceed to Checkout will expose details that will be part of the future Requisition. Typically this level of information will be prepared by the Requester.
- Shoppers can Assign a Cart without completing this information.

Proceed to Checkout: Adding Accounting Codes, Ship To Address etc.

1. Missing information, such as Shipping Address, Accounting Codes, etc will appear as an error (⚠️) at the top of the page.
2. Enter Shipping, Accounting Codes as needed. Click the Save button.

Proceed to Checkout: Splitting Distributions across Account Codes

1. On the Summary tab, scroll down to the Accounting Codes section.
2. Click the line edit button. Click the Add split link - Select % of Qty (or other) from drop down menu button. Enter the split % amount.
3. Enter the proper information, then click the Save button.