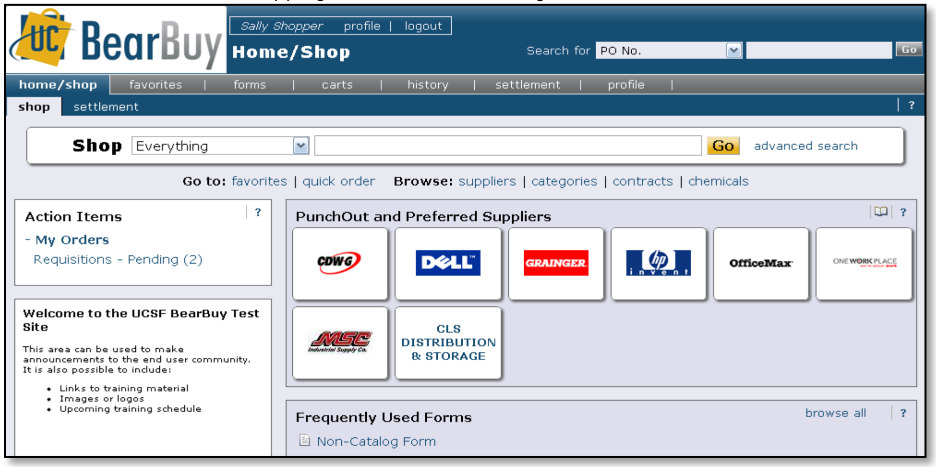
Shopper Quick Reference

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

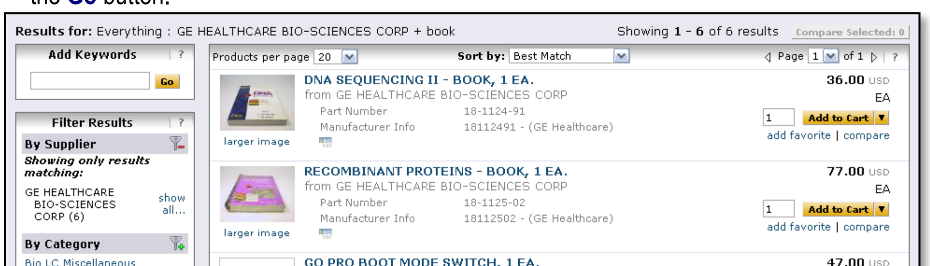
- This section covers Shopping with a Hosted Catalog, Punchouts and Forms.



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. [Add to 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 cart icon (top right corner of page).
8. To continue shopping click the **BearBuy** logo or **home/shop** tab.

Shop with Punch-outs

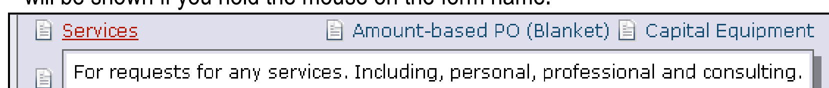
- **Punch-out** connects to the supplier's website, branded for UCSF and using our contract pricing. Punch-out sites retains the look and feel of the regular public website, however, the checkout will result in the products being returned to BearBuy and added to the active shopping cart.
- Follow the 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.



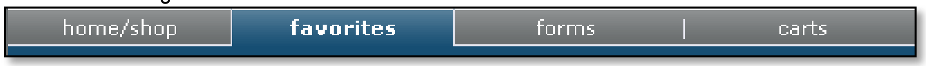
2. **Enter** all required information (indicated in bold on the form).
3. Select **Add and go to Cart** from the drop down menu.
4. Click the **Go** button to return to the shopping cart.

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 [Perform an action on (1 items selected)...] 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.

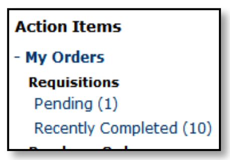
Assign Cart

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 requester.

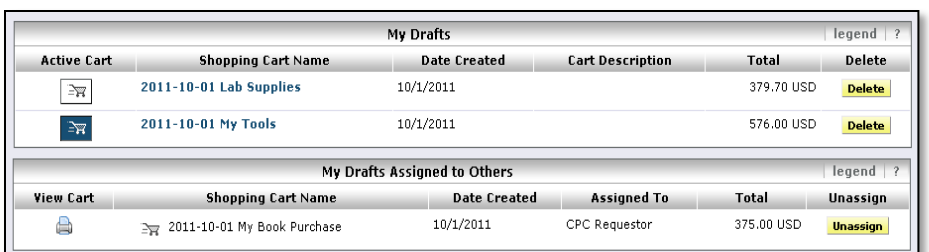
Reviewing Action Items

- 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**.



My Drafts | legend | ?

Active Cart	Shopping Cart Name	Date Created	Cart Description	Total	Delete
	2011-10-01 Lab Supplies	10/1/2011		379.70 USD	Delete
	2011-10-01 My Tools	10/1/2011		576.00 USD	Delete

My Drafts Assigned to Others | legend | ?

View Cart	Shopping Cart Name	Date Created	Assigned To	Total	Unassign
	2011-10-01 My Book Purchase	10/1/2011	CPC Requestor	375.00 USD	Unassign

- Once the Requester, has finalized their edits to the Cart, it will no longer be shown here. Completed carts are a Requisition, and are shown under **Carts > my requisitions**.

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 <u>permanently</u> 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 <u>without</u> 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.