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15.2 New Feature Review

July 2015

Enhancements for this Release

- One Icon for Suppliers with both Hosted Catalog and Punch-out
- Supplier Classification Icons display in My Approvals List
- Canceled Voucher Payments or Credits excluded from PO Invoice Total



One Icon for Suppliers with both Hosted Catalog and Punch-out

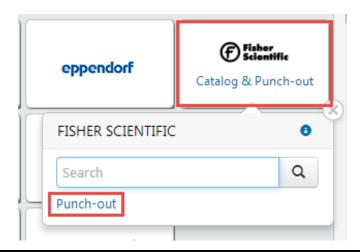
- Previously, if a supplier has a hosted catalog and a Punch-out site, there would be two supplier icons on the Shopping Homepage
- One icon would be for the supplier's hosted catalog and one icon would be for the Punch-out site





One Icon for Suppliers with both Hosted Catalog and Punch-out

- Now, there will be only one icon when a supplier has both a hosted catalog and a Punch-out site
- The supplier icon will have a description indicating that a supplier has a catalog and Punch-out site
- After clicking on the icon, a catalog search box appears as well as a link to Punch-out site
 - To search the supplier's catalog, enter search terms in box and click on the magnifying glass icon
 - To open the supplier's Punch-out site, click on the Punch-out link





Supplier Classification Icons display in My **Approvals List**

- Supplier classification icons indicate:
 - Type of supplier
 - Ex: Supplier is "Not Open For Ordering" stop



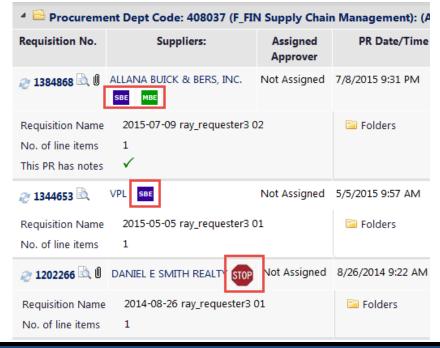
- Suppliers with special classifications
 - Ex: Diversity Classifications such as "Small Business" **SBE**
- Previously, supplier classification icons were not displayed in My Approvals List next to supplier names on requisitions or invoices

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Requisition No.	Suppliers:	Assigned Approver	PR Date/Time
<i>2</i> 1384868 🗟 🕅	ALLANA BUICK & BERS, INC.	Not Assigned	7/8/2015 9:31 PM
Requisition Name No. of line items This PR has notes	2015-07-09 ray_requester3 0 1 ✓)2	🗎 Folders
2 1344653 🗟	VPL	Not Assigned	5/5/2015 9:57 AM
Requisition Name No. of line items	2015-05-05 ray_requester3 0 1)1	🔄 Folders
<i>2</i> 1202266 🗟 🖞	DANIEL E SMITH REALTY	Not Assigned	8/26/2014 9:22 AM
Requisition Name No. of line items	2014-08-26 ray_requester3 (1	01	📔 Folders



Supplier Classification Icons display in My Approvals List

- Supplier classification information (if any) will display to the right of supplier name with each document within My Approvals List
- Can filter My Approvals List by supplier classification to view documents for a specific supplier class
- Information helps approvers quickly identify supplier classification to better assist in requisition and invoice approval





Canceled Voucher Payments or Credits excluded from PO Invoice Total

- Information about invoices applied to a Purchase Order are displayed on a PO's "Invoices" tab
 - Tab includes information about individual invoices and credits as well as totals
- Previously, if an invoice or credit was canceled, the invoice amount or credit would not be removed from total invoiced amount on the PO

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Line No.	Product Name					Catalog No.	Unit Price	Qty / UOM Ordered	Extended Price	Invoice Qty / Cost	Statu	JS		
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Canceled Voucher Payments or Credits excluded from PO Invoice Total

- Now, canceled invoices or credits memos are removed from total invoiced amount on PO
- When an invoice or credit memo is canceled, invoice information remains on the Invoices tab, but Invoice Total field value shows \$0.00
- If multiple invoices are associated with a PO, canceled invoices and credits do not contribute to total invoiced amount
- If a canceled invoice/credit memo is the only invoice/credit memo associated with the PO, the total invoiced amount is \$0.00

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		6/5/2015 t Name	Voucher Catalog No.	Cancelle Unit Price	d Qty / UOM Ordered		-	Sta

BearBuy Browser Requirements

- These new features are supported on the following browsers:
 - Internet Explorer 8 or above*
 - Firefox latest version
 - Chrome latest version
- To take advantage of all BearBuy features and functionality, always use one of these supported browsers
- Some features may not function on older browser versions
- The latest version of each browser works best
- For the latest BearBuy browser requirements, visit the <u>BearBuy System Requirements</u> page

*You must have "Compatibility View" turned off in Internet Explorer to view BearBuy properly. To turn "Compatibility View" off, open the Internet Explorer Tools menu and uncheck "Compatibility View".



Resources

 BearBuy Training Materials: <u>http://supplychain.ucsf.edu/training</u>



Additional Questions

- For BearBuy policies and procedural questions
 - Email <u>BearBuy@ucsf.edu</u>





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THANK YOU!

