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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

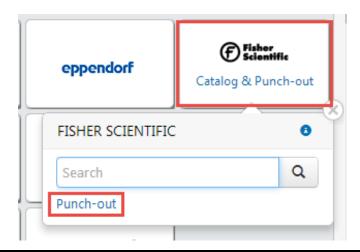
- Previously, if a supplier has a hosted catalog and a Punch-out site, there would be two supplier icons on the Shopping Homepage
- One icon would be for the supplier's hosted catalog and one icon would be for the Punch-out site





# 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



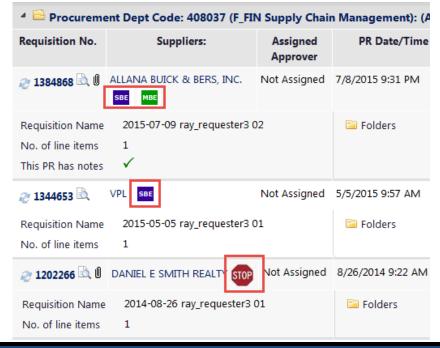
- Suppliers with special classifications
  - Ex: Diversity Classifications such as "Small Business" **SBE**
- Previously, supplier classification icons were not displayed in My Approvals List next to supplier names on requisitions or invoices

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Requisition 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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#### 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

Orders & Documents /Reference No.	▷ Document Search ▷ Search Documents マ ▷ Inv 300001244C Revision 0	voices - PO B00001244C			فبروالملا	Actions Add Con		
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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!

