

## Reminders!

America To Go is a Bearbuy Punch-out used to purchase food for business meetings and other campus events. This Punch-out contains menus from the University's preferred local restaurants and caterers for pickup and delivery to campus locations.

Please allow sufficient time for departmental order review and approval, and time for caterers to prepare and deliver your order (standard lead times are provided for each caterer). America To Go will send an order confirmation email to the PO Owner once the caterer has accepted the order.

## One Caterer per ATG order:

You can only add items from one caterer on an America To Go order. You cannot mix items from different caterers within the same America To Go order.

## Editing an America To Go order before submitting your BearBuy cart:

Shoppers may click the [Modify Items](#) link in their BearBuy cart to open the America To Go Punch-out order and edit the items in an order before it is submitted for approval.

## Changing your America To Go order after it has been fully approved in BearBuy:

Call America To Go's 24x7 Customer Care line (866) 284-8646 for assistance on changing an order. Do not submit BearBuy Change Order Request forms to change the items, quantities or pricing for America To Go Purchase Orders. These POs cannot be modified. Any additions to the order will be handled through the Voucher Match Exception process. Accounting Code (chartfield) changes can be submitted using the Change Order Request form provided the PO has not been fully invoiced.

## Entertainment Approval and Guest List

- Events under \$1,000.00 + [IF](#) Exceptional or additional approval is not required:
  - Guest list must be attached to the Requisition. Using the comments tab or internal notes to upload the spreadsheet of guests or by typing in the names.
- Events over \$1,000.00, + Exceptional approval is required:
  - List of actual attendees & host verification that the event occurred.
  - Completed [Supplemental Form](#) with exceptional approval.
  - Both forms must be attached, using the comments tab of the Requisition.

## Meeting & Entertainment Approver(s)

Caterers will not receive your order until the department's Meeting & Entertainment Approver has approved the Requisition in BearBuy.

- Meeting & Entertainment Approval is required on every ATG order, regardless of dollar amount.
- Approvers cannot approve ATG Requisitions they created or submitted themselves.
- Approvers cannot approve expenses for their supervisors.
- If the order requires additional or exceptional approval, a copy of the paper [Supplemental Form](#) signed by the Exceptional Approver should be attached using the Requisition or Purchase Order's comments tab in BearBuy.

## Medical Center Departments:

Since most UCSF Medical Center departments do not use BearBuy at this time, Medical Center departments should work directly with caterers to establish mutually acceptable purchasing methods such as Purchase Orders and credit card payments for orders.

1. Navigate to the Meeting and Entertainment (Special Approval Required) section on the BearBuy Shopping Homepage and select the **America To Go** Punch-out. If you are not on the Shopping home, navigate to **Shop> Shopping> Shopping Home**.



2. **Time:** Select a delivery/pick-up date and time: Select the time and date you wish the items be delivered/picked up. The calendar defaults to the current week and shows available delivery/pick-up time slots by every half hour.

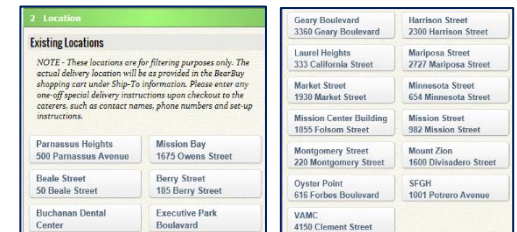
**Modify month:** If the desired week is not visible, select the month icon on the left hand side to expand a monthly calendar. Select the ► icon to navigate ahead and select your preferred delivery/pick-up week.

**Select a day:** After the calendar has updated, navigate to the column of your preferred day.

**Select a time:** Hover over your desired delivery/pick-up time. You can increase or decrease the time slots by increments of 5 minutes by selecting the ▲ or ▼ arrows.



3. **Select a location:** Select a campus area for delivery. You should select the campus area closest to where the food will be delivered. This address location is for filtering, reservation and tax purposes only. You will provide your full address for delivery when selecting the **Ship To location** in your **BearBuy** cart later in the process.

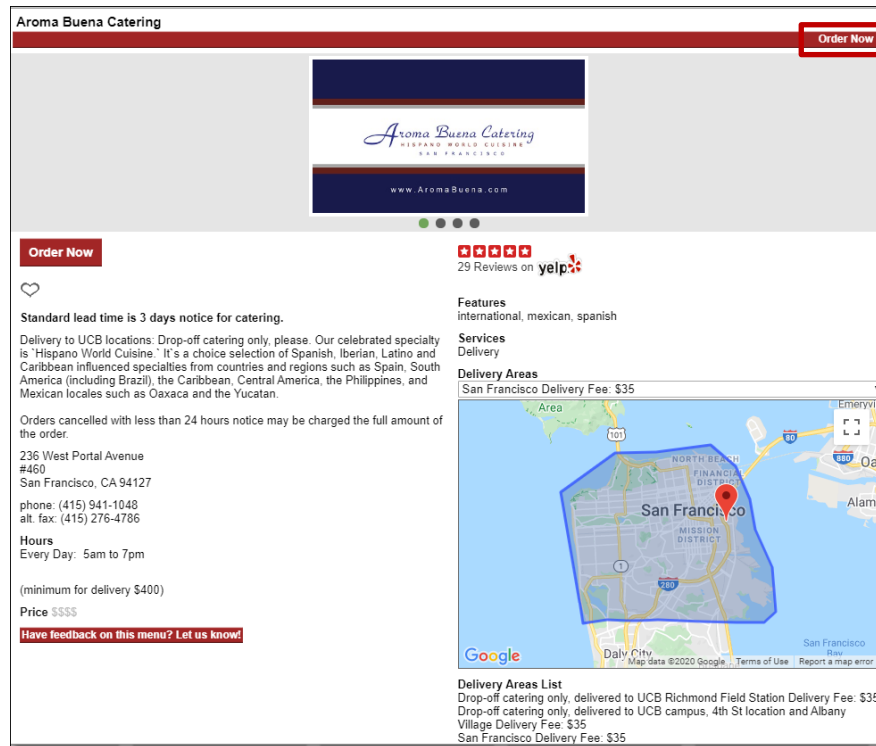


- 4a. **Select a Restaurant: Search and Filter** - Restaurants will appear on the right side of the page based on the location you selected in the previous step. **Filtering** by cuisine, service type and/or price will reduce the number of restaurants results you see. By default, you will see caterers that deliver to your location. Select only one restaurant name at a time in each session. Some restaurants are listed twice as they offer different menus for restaurant and catering orders.



Hover over the restaurant/caterer name for a quick overview. Standard lead times are provided for each restaurant. To view the restaurant/caterer menu, select the **Order Now!** button.

Alternatively, click on the restaurant/caterer name to view additional information such as delivery zones, delivery fees, restaurant/caterer description, etc. To access the restaurant/caterer menu from this page, select the **Order Now** link.



- 4b. **Select a Restaurant: Viewing a Menu** - The menu categories are located to the left side. Items located within a category will appear to the right. There is also a search box at the top of each menu. Use this to quickly find food items instead of viewing items in each category.

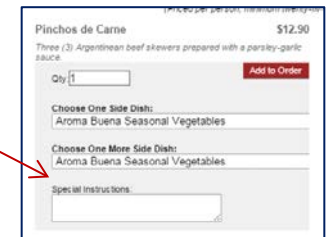


To print the menu, select the **print** icon in the upper right side of the menu.

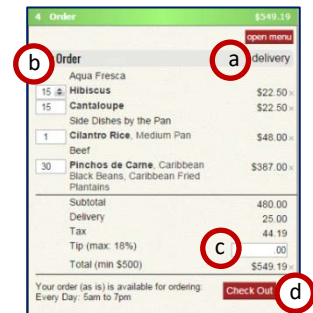
- 4c. Browse the various food options available. To order an item click on the item name to show ordering options. Enter the desired quantity in the **Qty** box.

You can add additional order information in the **Special Instructions** note section.

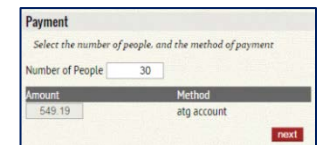
Click **Add to Order** to add the item to your order.



5. Added items appear on the left panel of the page. Once the item is added to your order you can:
- Change the order from delivery to take-out or dine in (if available).
  - Increase/decrease the quantity by hovering over the item quantity and selecting the **↑** or **↓** arrows. Continue adding additional items to your order.
  - Enter the **tip** amount. The maximum allowable tip is 18% of your order. Please consider delivery and service fee charges when determining the tip amount. If tip amount entered exceeds 18%, the tip will auto-adjust to the maximum amount (18%).
  - Once finished adding items click the **Check Out** button.

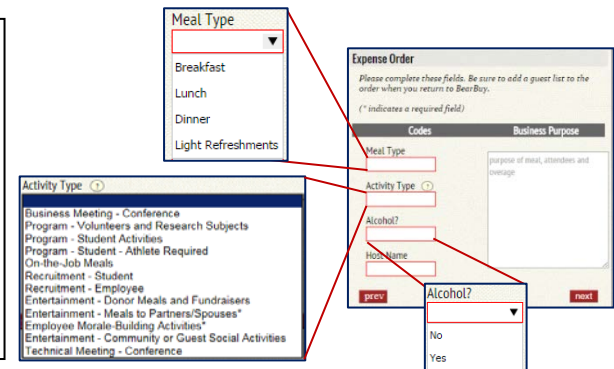


- 6a. **Number of People:** Enter the number of guests in the **Number of People** section. This number is used to calculate the per person cost of food in compliance with entertainment policy. Click the **next** button.



- 6b. **Expense Order:** Using the dropdown menus, select the **meal** and **activity type** and indicate if **alcohol** is included in the order. Enter the **host name** and **business purpose**. Click the **next** button.

**Alcohol:** There is a box to identify if alcohol will be served. Standard America To Go menus do not include alcohol. Alcohol is rarely served and requires special licensing. Caterers may be able to provide this as a custom order. If so, departments are required to seek additional authorization and licensing for the event.



Your order exceeds the per person campus dollar limits as seen in the table below. Please review and edit your order to be within limits. If your event has a specific business requirement which necessitates an exception to campus limits, you may complete this page and click the next button to proceed with this order. However, you will need to obtain exceptional approval for this request and include that approval on the requisition before the event date.

Meal type	Campus Limit
Breakfast	\$27.00
Lunch	\$47.00
Dinner	\$81.00
Light Refreshments	\$19.00

Note: If your event costs are higher than the policy limits, you will receive a warning notice as illustrated to the left. You are strongly urged to remain within limits. Additional approval for policy exceptions must be obtained prior to placing an order with a caterer/restaurant. See the Exceptional Approval section if there is a need to exceed policy limits.

**Instructions for Delivery**

Use this space to provide any special pick-up or delivery instructions that are necessary to fulfill your order. This field is optional.

**Note:** Do not specify your shipping address below. You must select your actual delivery address in the Ship-To section of your BearBuy cart.

Instructions

cell number for delivery

[prev](#) [next](#)

**Favorite Order?**

If you would like to save this order as a favorite, please enter a name below (minimum four characters).

**Note:** - If you already saved this order as a favorite and do not want to save it as a new favorite, simply click next.

Name for Favorite:

[prev](#) [next](#)

6c. **Instructions for Delivery:** If desired, you can add instructions for the caterer such a cell phone number for delivery, loading-unloading instructions, room directions or other special instructions. Click the **next** button.

6d. **Favorite Order?** If you wish to save this order as a favorite to quickly recreate this order in the future, enter a name in the **Name for Favorite** box (minimum four characters). If you do not wish to save this order to your favorites simply select the **next** button.

You can access a list of your favorite orders by clicking the **Favorites** link on the upper right corner of your screen. Please note that all entertainment information will carry over to your new order.

[Home](#) [My Orders](#) [Favorites](#) [Contact Us](#) [Chat Live](#)

6e. **Confirm information:** The address associated to your Personal Info is the address of general campus area (step 3). The actual delivery address of the catering order must be added in the Ship to location in your BearBuy cart.

The special delivery instructions you added in step 6c are carried over to this page. Edit your note if needed.

Orders default to delivery service. You can change to pick up or dine in service (if available) by selecting the Service drop down menu.

**Confirm Information**

Check the information for your order and click Next when you are done.

Name: Melissa [See]

Location: 600 Parnassus Avenue  
San Francisco CA 94143

Phone: (000) 000-0000

Time: Tu, 5/2/2015 11:00 am

Service: **delivery**

Instructions: Please call as soon as the order is ready

[prev](#) [next](#)

You will see your order information populate on the right side of your screen. This page contains all itemized items along with Business and Entertainment information you entered.

To print the America To Go Order information, select the **print** icon in the upper right corner of this screen.

Once you have confirmed your information, click **next**.

**AMERICA TO GO** ONLINE ORDER

Vendor: **Jamba Juice Catering**  
100 Parnassus Avenue  
San Francisco, CA 94143  
Tel: (415) 366-1200  
Fax: (415) 366-1270

Location: **PICK UP**  
Melissa Gee  
Tel: (000) 000-0000  
Mon, 6/1/15 11:00 am  
Pickup Instructions

Qty	Category	Item Description	Unit Price	Line Total
1	Tasty Bites	Cheddar and Dijon Toasted Buns	3.49	27.92
		Sandwich		
		Subtotal		27.92
		Tax		2.44
		Total		\$28.36

Payment: **ATG ACCOUNT** 30.96

**Exclusions:**

Meal Type: Light Refreshments  
Activity Type: Business Meeting - Conference  
Alcohol?: No  
Host Name: Carla (Test Order)

Business Purpose: Business purpose will populate in screen when entered. Tax. Do not bill order

Order placed: Mon, 5/18/15 05:13 pm by Melissa Gee  
This order is for 8 people  
\$3.53 per person

6f. **Send the Order to BearBuy:** America To Go asks you to review your order one last time. It is **extremely important** that you carefully review your order for accuracy. Click the **submit now** button to return your order to BearBuy as a draft shopping cart

7. **Your ATG order is now in your BearBuy cart.** After an order has been returned to BearBuy, Shoppers or Requesters must complete the Requisition by providing a guest list, a delivery address, including the exact delivery location as well as financial information.

**Shopping Cart** for item Shopper2

1 item(s) for a total of **480.00**

Name this cart: 2015-01-09 sam\_shopper2 01

[Proceed to Checkout](#) [Assign Cart](#)

Have you made changes? [Update](#) [Help](#) [Empty cart](#) Perform an action on (0) items selected. [Select All](#)

**AMERICA TO GO LLC** more info...  
AP Dispatch Print  
1001 AVENUE OF THE AMERICAS, 4TH FLR, NEW YORK, NY 10018 US

The item(s) in this group was retrieved from the supplier's website. What does this mean?

Need to make changes? [MODIFY ITEMS](#) [VIEW ITEMS](#) Item(s) was retrieved on: 5/7/2015 2:15:24 PM

Product Description	Unit Price	Quantity	Total
Arora Buena Catering (06/02/2015): Meal Type: Lunch, Activity Type: Employee Morale-Building Activities, Alcohol?: No, Host Name: Carla Test Order, 30 people, \$18.33 per person. Note: Carla Test Order, 30 Pichos de Carne, 3 Cilantro Rice, 15 Cantaloupe	480.00 USD	1 EA	480.00 USD

Item added on: May 1, 2015

[Add to Favorites](#) [Remove](#) [More Actions](#)

Part Number: 1375562  
Manufacturer: Arora Buena Catering  
Commodity Code: 00307 - Facility Rental/Food-57200  
Taxable: ☒  
Capital Expense: ☐

**Note:** The order subtotal will be the total order amount not including tax and tip. Tax and tip will be visible on the Voucher not on the Requisition or PO.

8. **Completing a BearBuy Requisition:**

- Guest Lists must be attached to the Requisition using the comments tab or internal notes to upload the spreadsheet of guests or by typing in the names.
- The ship to address will be the address that the caterer uses for DELIVERY. Be sure to update this address to the delivery address.
- From this point forward, orders should be completed as a standard Requisition in

**Send the Order**

Check your order information to the right and press **SUBMIT NOW** below to send your order to BearBuy for approval. Once your order is approved, a PO will be assigned and your order will be sent to the vendor.

To go back and modify the order, press **PREV**.

[submit now](#)

[prev](#)



BearBuy. Instructions on completing a BearBuy Requisition can be found on the [Supply Chain Management Training site](#).

### Requisition Approvals for Meeting & Entertainment Approvers:

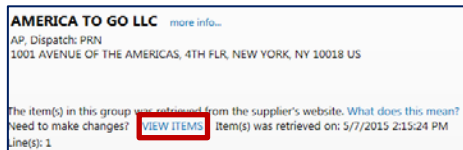
America To Go Requisitions are routed to Meeting and Entertainment approvers for review.

- Meeting and Entertainment Approval is required on every America To Go Requisition, regardless of dollar amount.
- Approvers cannot approve Meeting & Entertainment Requisitions they created themselves.
- Approvers cannot approve expenses for their supervisors.
- If the order requires exceptional approval, a copy of the paper [Supplemental Form\\*](#) signed by the Exceptional Approver should be attached to the Requisition in BearBuy.

Approvers are responsible for reviewing at the Requisition and validating that the purchase is in compliance with entertainment policy:

- ✓ Documentation is complete and correct
  - Guest List attached, Host Name provided and Business Purpose visible.
- ✓ Allowable funding sources are used

**View Items:** Approvers may click the [View Items](#) link on the BearBuy Requisition to open the order in the America To Go Punch-out. This provides a better view of the full order details before approving an order.



The order will open in America to go and Approvers can view order details by clicking the [Check Out](#) and [Next](#) button to see all ordered and expense account information.



Approvers cannot make changes to the order prior to approving. If an order needs to be changed prior to placement, it should be returned to the Requester with a comment.

Approvers can also reject the Requisition to deny the purchase request.

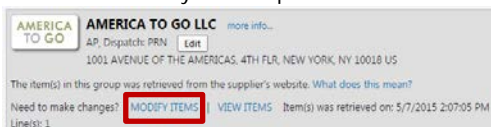
### Exiting the Punch-out Session:

To exit the Punch-out session and return to BearBuy, close the window by clicking on X in the top right corner of the browser window and then click [Cancel Punch-out](#).



### Changes to Your Order

**When your order is in a BearBuy Cart:** Shoppers and Requesters may click the Modify Items link in the BearBuy cart to open the America To Go Punch-out order and make edits.



The order will open in the America To Go Punch-out and Shoppers or Requesters can scroll through the order by clicking the [Check Out](#) and [Next](#) button to see all items and expense account information.



Add or delete items as needed. Be sure to update the expense information if changes in the business purpose or number of attendees occurred. Click on [Submit](#) to return the changes to your BearBuy cart.

**After an Order is approved and a Purchase Order has been created:** Call America To Go's 24x7 Customer Care line at (866) 284-8646 for assistance changing an order.

- Do not submit BearBuy Change Order Request Forms to change the items, quantities, or pricing for America To Go orders. These cannot be modified through a Change Order Request form. Chart-field changes and PO closures (lien removals) can be submitted using the BearBuy Change Order Request Form.
- If changes to your order caused the invoiced amount to be higher than the amount on your America To Go Purchase Order, your invoice may go through the Match Exception Process described in the next section.

### Match Exceptions in BearBuy

- In BearBuy, invoice line items are matched to Purchase Order line items. If there are differences in the Invoice quantity or price compared to what was specified on the PO, a match exception is generated and will require review by a Match Exception Handler.
- Match exceptions are generated based on the following tolerances:
  - Invoice line quantity or price variance exceeds 10% or \$500, whichever is less.
- Performing a Purchase Order revision (aka Change Order) will not resolve exceptions.

### To Resolve a Match Exception for Meeting and Entertainment

1. The Match Exception Handler is expected to research variances and take the necessary actions to resolve the Match Exception.
2. All Match Exception resolutions must be completely documented using the comments tab in BearBuy. To comply with Entertainment Policy, match exceptions that include approving increases in quantity or price for entertainment must include the following documentation:
  - a. A revised per person dollar amount that reflects the actual expenditures for the event.
  - b. A complete guest list of the actual guests who attended the event.
  - c. Approval from the Event Host
  - d. Approval from the Meeting & Event Approver for the increase.
  - e. If the event cost exceeds entertainment thresholds, approval will be sought from the designated Exceptional Approver.
  - f. This documentation should be attached to the invoice voucher as a file attachment using the comments tab for audit purposes.
3. The Match Exception Handler will work with the Event Host to obtain and document the changes in event cost according to the documentation requirements listed above.
4. Instructions on resolving Match Exceptions in BearBuy can be found on [Supply Chain Management Training](#) page.

## My Orders:

You can access a list of all orders associated to your America To Go Punch-out by clicking the [My Orders](#) link at the upper right corner of your screen. Please note that all entertainment information will carry over to your new order.

Annotations for the My Orders page:

- Only 25 orders are displayed at a time
- Current date & time when My Orders was selected
- Download as an excel file
- Print this page
- Email excel file version to yourself
- My Orders 5/18/2015 2:32:52 PM
- Results 1-25 of 100
- Page 1 of 7
- Navigate to additional pages to view other orders you created
- Order information: Includes an America To Go Order ID, order delivery/pick-up date and time, Caterer or Restaurant name, Meal Type entered, etc.
- Lists the status of the order: D: Draft- Order was created but not submitted; S: Sent - PO created and sent to caterer; X: Order cancelled
- Add or remove orders as favorites
- Place same order by selecting reorder

## Special Requests and Custom Orders:

- Many caterers are able to create custom orders to meet your catering needs. Call caterers directly to build and add a custom order to the Punch-out. After a caterer/ATG uploads your custom order to the Punch-out, you will receive an email from ATG. You can then go into the ATG Punch-out to place the customer order using the steps below.

### 1. Order Requests

In the upper left under [Order Requests](#), orders available for processing appear. Click on your order to load the order.

1 Order Requests

Existing Requests

Please select an order request below for processing.

2695138 (D) Au Bon Pain 1/30/2020 12:30 pm	2695141 (D) Au Bon Pain 1/25/2020 01:30 pm
--	--

**TIP:** Each order has a unique request number to help you identify orders if you have multiple. This number is included in the email you received from ATG about the order.

The order opens and appears on the main page. Review the order to ensure it is correct. Click the [Accept](#) button to begin checkout (you can edit the order in the cart once loaded, if needed).

If your order is incorrect, you can click the [Reject](#) button. If you click this button, you cannot place your order. Contact the caterer/ATG to revise the order and have them upload the order again.

Request 2695141

Select accept to load this order to your cart for editing and checkout. Select reject if this order is invalid.

accept reject

866-ATG-TOGO (866-284-8648) AMERICA TO GO customerservice@americatogo.com

ATG ORDER ID: [TBD]

Customer	Vendor
<b>Sam Shopper</b> <b>UC San Francisco</b> 500 Parnassus Avenue San Francisco, CA 94143 Tel: (000) 000-0000 Email: sam.shopper@ucsf.edu	(D) Au Bon Pain 19 Fid Kennedy Avenue Boston, MA 02210 Tel: (212) 555-8745 Fax:

**DELIVERY Sat, 1/25/20 01:30 pm**

Qty	Category	Item Description	Unit Price	Line Total
1	L.S. 1.25.20 #85478	Food and Beverage for 50 Guests	800.00	800.00
1	L.S. 1.25.20 #85478	Linens and Staff	250.00	250.00

Payment		Subtotal	1,050.00
ATG ACCOUNT 1,155.00		Tax	105.00
		<b>Total</b>	<b>\$1,155.00</b>

Order placed: wed, 1/15/20 04:42 pm by Sam Shopper  
This order is for 50 people  
\$23.10 per person

The order, time, and location will automatically load in a few seconds. Please allow the order to fully load this information.

### 2. Check out

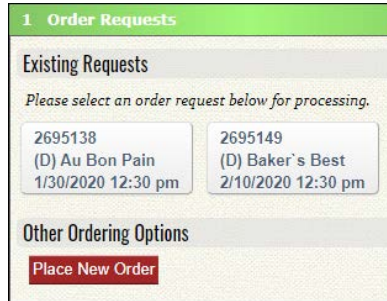
Once your order has loaded, enter the [Tip](#) amount that was paid. The maximum allowable tip is 18% of your order. Please consider delivery and service fee charges when determining the tip amount. If the tip amount entered exceeds 18%, the tip will auto-adjust to the maximum amount (18%). Then, click the [Check Out](#) button.

Subtotal	1,050.00
Tax	105.00
Tip (max: 18%; \$189.00)	120.00
Total	\$1,275.00
For Later	Check Out

- Continue the check out process like a normal order. Please see step 6a above for instructions on check out.

### Placing a regular Order with Custom Orders

1. If you want to place a regular order from caterer menus without placing an available custom order that appears for you in ATG, you can click the Place New Order button instead of clicking an order.



**1 Order Requests**

**Existing Requests**

*Please select an order request below for processing.*

2695138 (D) Au Bon Pain 1/30/2020 12:30 pm	2695149 (D) Baker's Best 2/10/2020 12:30 pm
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**Other Ordering Options**

**Place New Order**

This will bring up the regular ordering process where you can create an order from caterer standard menus.

Be sure to remember to come back into ATG to place your custom order as well. Once these orders are placed, they disappear from your ATG account.

\*NOTE: some schools have their own exceptional approval process. Please check with your school on their processes.