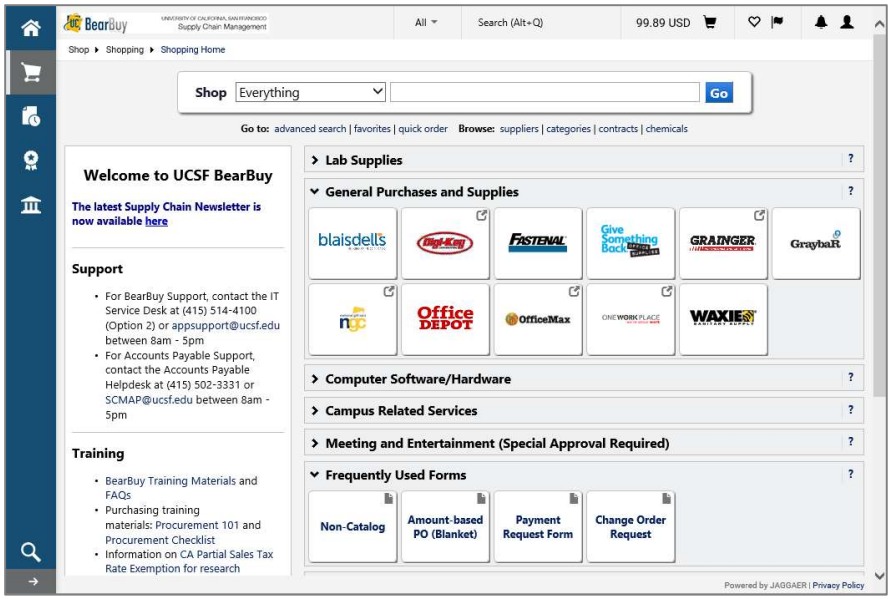
Shopper Quick Reference

Accessing BearBuy

1. Log into **MyAccess** and select the **BearBuy** link.
   a. By default, you will be directed to the Shopping Homepage, unless you set your homepage to a different BearBuy page.
   b. If you are not on the Shopping Homepage, use the icons on the left to go to **Shop > Shopping > Shopping Home**.
2. Review the **Bulletin Board** on the left side of the homepage for announcements, such as system downtimes or Supply Chain Newsletters.

Ways to Shop

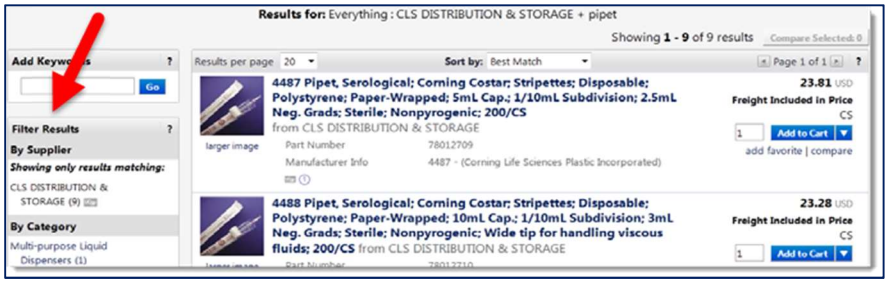
- This section covers Shopping with Hosted Catalogs, Punch-outs, and Forms.

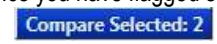


Shop with Hosted Catalogs

- The BearBuy Hosted Catalogs contain thousands of items from preferred suppliers at University-specific pricing.

1. To search for items in the hosted catalogs, enter your search terms in the **large search box** at the top of the Shopping Homepage, and then click the **Go** button.
2. Optionally, click on the **advanced search** link to search by additional criteria, such as Product Description, Part Number, Supplier, or Manufacturer Name.



3. The search results appear. The product picture (if any), description, and other detailed specifications are typically shown.
   a. On the left side are the **Filter Results** options. This lets you filter the results by **Supplier, Manufacturer, Packaging UOM (Unit of Measure)** and more.
   b. Use the **compare** link to compare two or more items. Once you have flagged several items to compare, click the **Compare Selected** button. 

4. Click the **Add to Cart** button to add items to your cart.

5. To access the shopping cart after adding an item, select the ***1 item(s) added, view cart*** link, or click the cart icon located at the top right corner of the page.
6. To continue shopping, click the **Continue Shopping** link near the top of your screen.

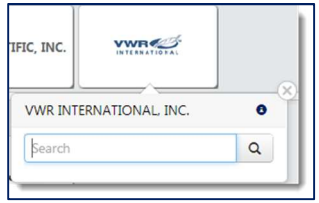
Shop with a Specific Hosted Catalog Supplier

- Follow the below instructions to search for products from a specific hosted catalog supplier.

1. Click the **catalog supplier's icon.**
2. Enter search terms in the search box that appears below the supplier's icon. Click the **magnifying glass** icon.
3. The search results appear. The product picture (if any), description, and other detailed specifications are typically shown.
   a. On the left side are the **Filter Results** options. This lets you filter by **Supplier, Manufacturer, Packaging UOM (Unit of Measure)** and more.
   b. Use the **compare** link to compare items. Once you have flagged several items to compare, click the **Compare Selected** button.

4. Click the **Add to Cart** button to add items to your cart.

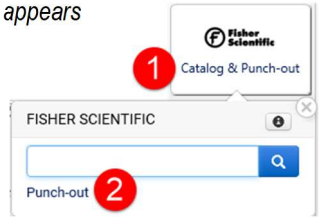
5. To access the shopping cart after adding an item, select the ***1 item(s) added, view cart*** link, or click the cart icon located at the top right corner of the page.
6. To continue shopping, click the **Continue Shopping** link near the top of your screen.



Shop with Punch-outs

- **Punch-outs** connect to the supplier's website and contain contract pricing. Punch-outs retain the look and feel of the supplier's regular public website; however, checkout will result in the products being returned to BearBuy and added to your active cart.
- Punch-outs are identified by an arrow symbol in the upper right corner above the supplier's logo, or the supplier's icon will display the text "Catalog & Punch-out."
- Follow the supplier's directions for submitting the items back to BearBuy as each supplier's site may differ. Product pricing and availability may vary between the supplier's public and University websites.

1. Click the **supplier's icon** to begin the Punch-out session.
   Note: You may need to click a 2nd "Punch-out" link that appears when you click on the supplier's icon.

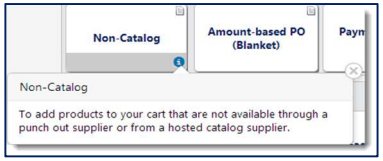


2. **Search** in the supplier's catalog for items and **add** to the shopping cart.
3. Complete shopping in the punch-out, then return items to the BearBuy shopping cart.
   a. To exit the punch-out, you may need to close the browser window and click the **Cancel Punch-out** button in the main browser page.

Shop with Forms

- Use forms to create shopping carts for non-catalog items. There are several forms, including Non-Catalog, Amount-based PO (blanket), and Payment Request.
- Forms are identified on the Shopping homepage by a form symbol in the upper right corner above the form name.

1. From the Shopping homepage, select a form. The majority of forms are available in the **Frequently Used Forms** and **Forms for Specific Purchases** sections of the homepage.
   a. A full listing of forms is also found in the cart icon on the left menu under **Shop > Shopping > View Forms**.
   b. To obtain more detail on what a form is used for, hover over the name of the form until the icon appears. Click on the icon and a description of the form will appear.



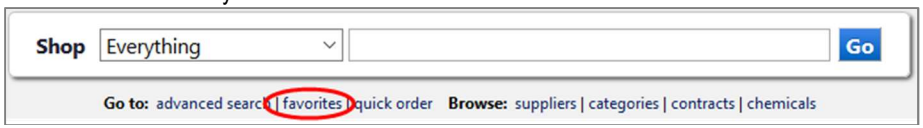
2. **Enter** all required information (indicated in bold on the form).
3. Select **Add and go to Cart** from the form's Available Actions dropdown menu.
4. Click the **Go** button to add the form to your shopping cart. You will be directed to your cart.

About Favorites

- Add routinely ordered items to a Favorites folder for quick re-ordering.
- Only hosted catalog items and forms can be added as Favorites.

1. Navigate to the item you would like to favorite.
   a. For catalog items, search for the item. Select the item's corresponding **add favorite** link in the search results.
   b. For forms, open the form you would like to favorite. Fill out the form with information you want to save. This information will be retained whenever you add the form to your cart. Navigate to the **Available Actions** menu at the top of the form and choose **Add to Favorites** in the dropdown menu. Click the **Go** button.
2. A pop up window appears. Edit the **Item Nickname** (if desired). The correct product name will display on the requisition and purchase order to the supplier.
3. Select the **Destination Folder** to save the item to an existing Favorites folder (or create a new folder using the **Add New** link) and click the **Save Changes** button. A message will appear noting the product has been added to the folder.

- To access saved Favorites, click the **favorites** link under the BearBuy search bar. Then, select the folder where you saved the item.



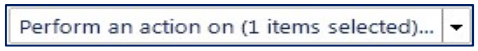
- Favorites can also be searched.

1. Go to your Favorites, and then click the **Search** button on the left. A search box appears.

2. Enter **keywords** you are searching for. Click the **magnifying glass** icon to search.
3. The search results return favorites and favorites folders that contain your search keywords.
4. Click on a result to navigate to the folder or favorite.
5. To add a saved favorite to your cart, click the favorite's corresponding **Add to Cart** button.

Updating and Editing Shopping Cart Items

1. After adding items to your shopping cart, click the shopping cart icon at the top, and then click **View My Cart**.
2. Select the checkbox next to the item you'd like to edit.
3. Use the dropdown to perform the desired action: **Add to Favorites, Remove Selected Items, Move to Another Cart.**

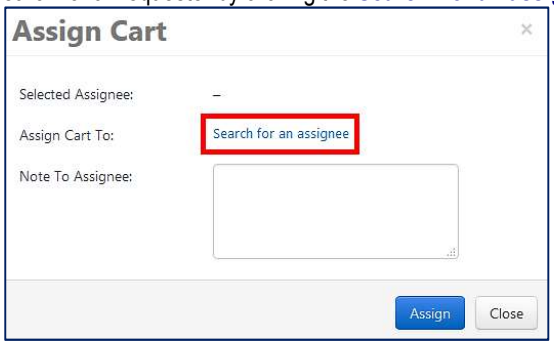


Assign Cart

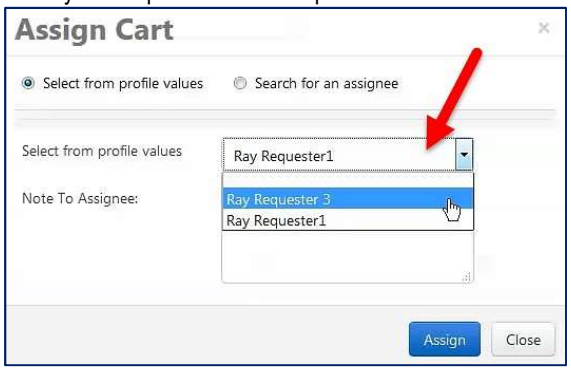
Once you are finished adding items to your cart, assign the cart to your Requester to submit the order for you.

1. Click the **Assign Cart** button.

2. Specify the **Requester**.
   a. If you don't have any Requesters saved in your profile:
      i. Search for a Requester by clicking the **Search for an assignee** link.



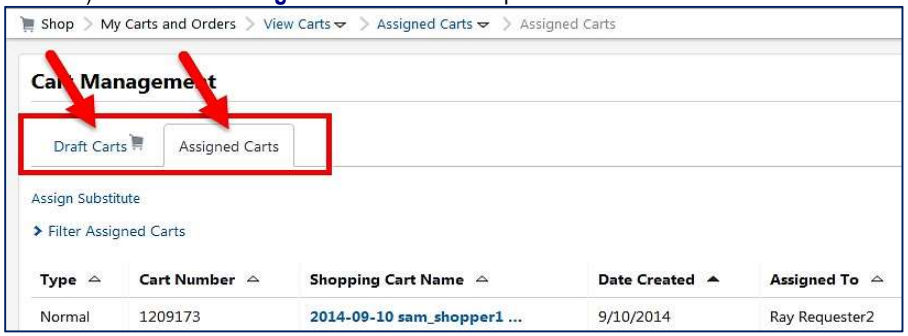
      ii. In the pop up window, enter the Requester's name and click **Search**.
      iii. Select your Requester from the results listed.
   b. If you have the Requester saved to your profile:
      i. Click the **Select from profile values** radio button.
      ii. Select your Request from the dropdown.



3. Enter a **comment** for the Requester in the **Note To Assignee** box (optional).
4. Click the **Assign** button.
5. BearBuy will send an email notification to the Requester.

Status of your Cart

1. To view your shopping carts, use the icons on the left to go to **Shop > My Carts and Orders > View Carts.**
2. On the Cart Management page, there are two tabs representing different types of carts:
   a. **Draft Carts**—lists carts that you created but have not yet assigned to a Requester, and carts returned to you by a Requester. Click on the **Action** dropdown (located to the right of the cart) to **View, Activate,** or **Delete** the cart.
   b. **Assigned Carts**—lists carts that you assigned to a Requester but the Requester has not submitted yet. Click on the **Action** dropdown (located to the right of the cart) to **View** or **Unassign** the cart from the Requester.

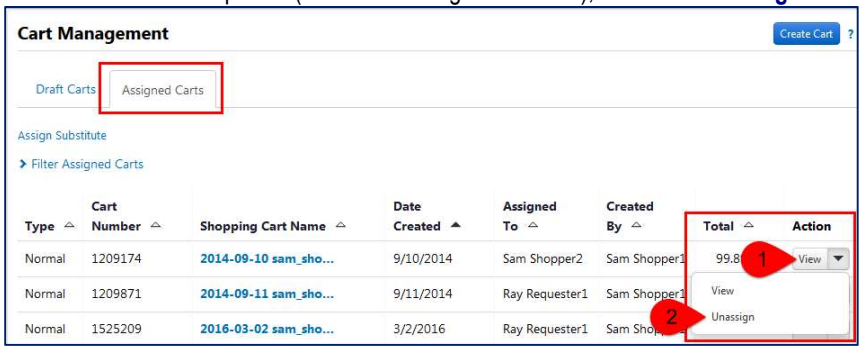


- Once the Requester has processed and submitted the cart, it will no longer be listed on your carts page. Completed carts become requisitions and are shown under **Shop > My Carts and Orders > View My Orders (Last 90 Days).**

Unssigning Shopping Carts

- Assigned carts can be unassigned if you need to edit the cart or change the Requester.

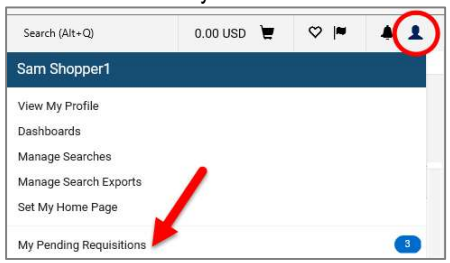
1. Use the icons on the left to go to **Shop > My Carts and Orders > View Carts**.
2. On the Cart Management page, click on the **Assigned Carts** tab.
3. Click on the **Action** dropdown (located to the right of the cart), and select **Unassign.**



4. The cart will now appear under the **Draft Carts** tab. You can now edit or delete the cart.

Reviewing Pending, Recent, and Action Items

- Use the links at the top to review your **Notifications** and **Action Items** that require your review and possible action.
- Review the status of your documents and orders in the menu under your profile.

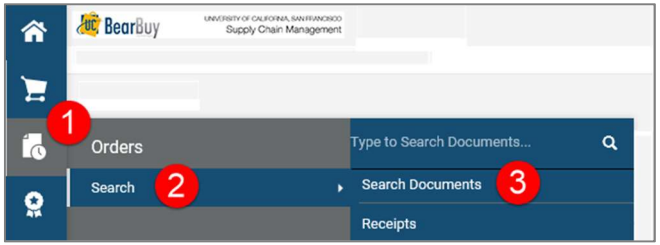


Requisition and Purchase Order History

- All requisitions and purchase orders are permanently stored within **BearBuy.**
- Shoppers only have access to their own orders; they cannot view other people's orders.

1. To search for your past orders, use the icons on the left to go to **Shop > My Carts and Orders > View My Orders (Last 90 Days).** Note: The system will search for documents from the Last 90 Days by default, but you can use the Date Range filter on the left to expand your search.

Alternatively, go to **Orders > Search** to search for your Requisitions, Purchase Orders, Vouchers, or Receipts. For more detailed instructions, visit: https://supplychain.ucsf.edu/sites/supplychain.ucsf.edu/files/wysiwyg/BearBuy_Document_Search_Quick_Reference.pdf



Reviewing Your Profile

- Note: Some profile fields are view-only and cannot be edited.

1. Click on your profile icon at the top. Then, click the **View My Profile** link.

2. Use the menu on the left to review your profile information.
   a. **User Profile and Preferences**—lists your contact information.
   b. **Notification Preferences**—lists your BearBuy notification preferences. You may update your notification preferences as desired.
3. If you will be adding purchasing information such as accounting codes (i.e. SpeedType, Fund, Account, etc.), click **Default User Settings > Custom Field and Accounting Code Defaults.** Click **Default Addresses** to review/edit shipping addresses.
4. Click the **Save** button to save any edits.

For more detailed instructions, visit: https://supplychain.ucsf.edu/sites/supplychain.ucsf.edu/files/wysiwyg/Updating_Your_Profile_Settings_Quick_Reference.pdf

Proceed to Checkout

- Clicking the **Proceed to Checkout** button Proceed to Checkout displays details that will be part of the future requisition. This level of information is typically entered by the Requester, but can be be entered by the Shopper.
- A cart may be assigned to another Shopper or Requester so that this information can be added or reviewed.

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

1. Missing information, such as Shipping Address or Accounting Codes, will appear as an error ( ) at the top of the page. Enter the missing information as needed.

Proceed to Checkout: Splitting Distributions across Accounting Codes (chartfields)

1. On the **Requisition > Summary** tab, scroll down to the **Accounting Codes** section.
2. Click the line **edit** button. Click the **add split** link—select **% of Price** (or **% of Qty** or **Amount of Price**) from the dropdown. Enter the split percent or amount.
3. Click the **Save** button.