Placing Non-Catalog Orders in BearBuy

You can find a lot of lab supplies, computer supplies and equipment, and office supplies from our contracted vendors (also referred to as “catalog vendors”) by searching the BearBuy catalog. From the home page, you can try entering search terms in the search box at the top of the page. You can add items to your cart from the results. This process generally works well for the items that our contracted suppliers carry. Many of them are giving us educational discounts, and we have systems in place to streamline the accounting procedures, so if you can find what you’re looking for from this type of search, you’re encouraged go this route for ordering those items.

For supplies and equipment that are not found in the BearBuy catalog, you’ll need to use either the Non-Catalog Form or the BluCard Tracking Form. Most often, you’ll likely be using the Non-Catalog Form, but the BluCard Tracking Form is to be used when the vendor only accepts credit cards as a method of payment. If you aren’t sure which form to use, contact us at physi-finance@lists.berkeley.edu.

The Non-Catalog Form can be found on the home page. After you click to open it, your cursor will be in the Enter Supplier box. Many vendors can be found just by typing the beginning of the name. If they’re set up in our system for ordering, the name should pop up for you to click on. If you can’t locate them, please contact us for help.
Once you’ve selected the supplier, scroll down and enter a product description in the Item Information box, a catalog/part/item number (if you have one) in the Catalog No. box, and enter quantity and prices in the appropriate boxes. Most of the time you won’t need to complete any other fields in this form.

Scroll back up to the top. If this first item is the only thing you’re ordering, then click Go for Add and Go to Cart. If you have a list of things you’re ordering, select Add to Cart and Return instead, and click Go, and enter the information for the second item. Repeat this process until you’ve entered your last item, then change the selection back to Add and Go to Cart, and click Go. (For very long lists of items, this process can be tedious, but unfortunately, it’s necessary. Copy-and-paste should minimize the difficulty somewhat.)

The next screen will show a summary of what you’ve put in your cart. To enter your chartstring or speedtype, click on View Cart Details. Scroll down to the middle of the page and click on the edit button at the far right side of the Accounting Codes section.
If you entered any speedtypes or chartstrings while setting up your profile, there will be a drop-down menu for “Select from your code favorites.” You can make a selection from here, and the chartstring will populate the appropriate fields. Otherwise, enter the chartstring or speedtype in this section manually. If you’re not sure which values go in which fields, contact us at physi-finance@lists.berkeley.edu. (Note: the Speedtype field cannot be left blank! If you don’t have a speedtype, make sure to leave the word “none” in that field.) Click Save.

If you have a quotation from your supplier, there is a section below Accounting Codes where you should attach it. We recommend clicking the Add Attachments button on the right, for External Notes and Attachments, which will send a copy of the quotation back to the supplier along with the Purchase Order. This serves to make it clear to the supplier that the PO is based on their quotation.

Once you’ve entered your chartstring or speedtype and attached any relevant documents, you can move the cart forward in one of two ways. In the upper right corner are two buttons, Submit and Assign. Clicking Submit will send the cart into the workflow, and after necessary approvals have been given, a PO will be sent to the supplier (you’ll receive an email from BearBuy letting you know this has happened, and the message will contain the PO number).

You can click Assign if your cart needs to be reviewed by someone else before it enters the workflow. Click the button and then “Search for an assignee.” Once you’ve selected this person, you can check a box for “Add to Profile” which will make it quicker to assign carts to the same person in the future.