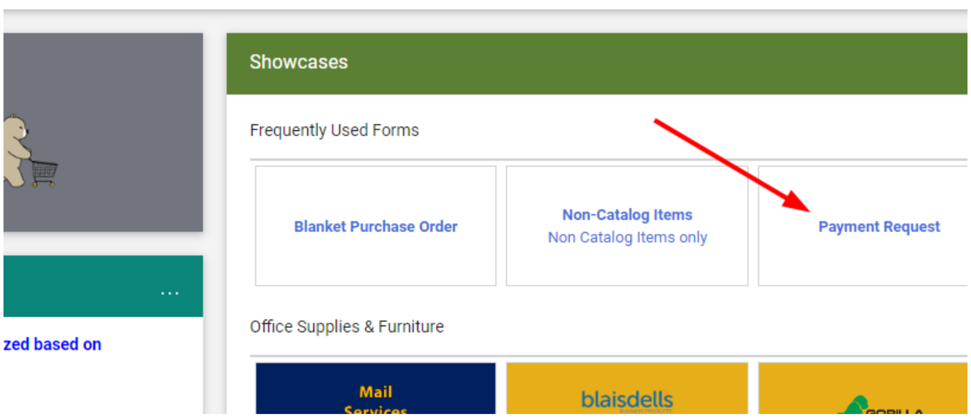
Using the Payment Request Form in BearBuy

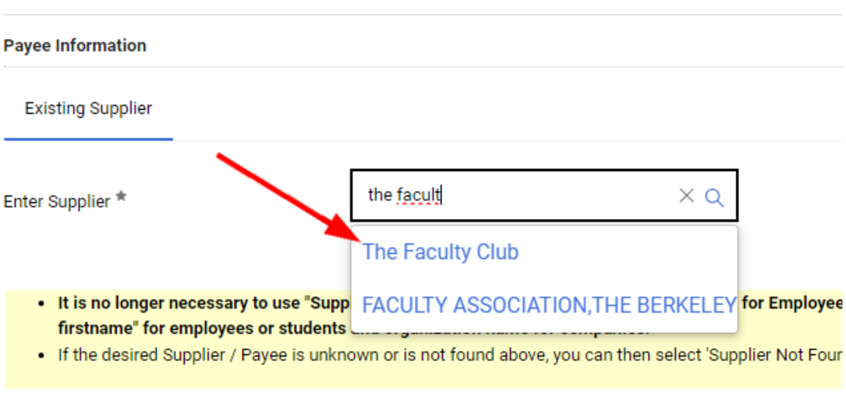
The Payment Request form is used when we've received from a vendor an invoice with no pre-existing Purchase Order. The most common occurrences of this sort in Physics are publication charges for articles, and lodging or dining expenses at one of the faculty clubs on campus.

Please note, this form can't be used in situations where a Purchase Order should've been established before the transaction took place. If you have questions about this, please contact us at physi-finance@lists.berkeley.edu.

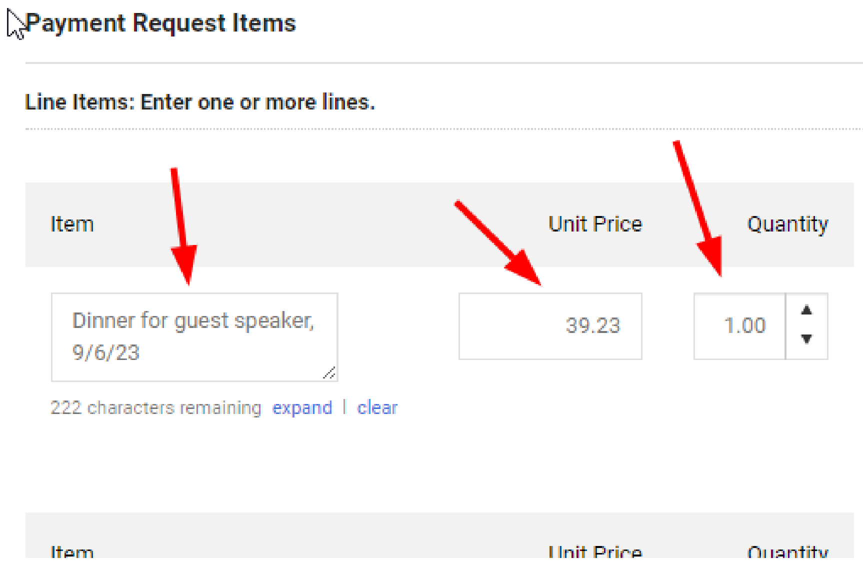
From the home page, click on Payment Request under Frequently Used Forms:



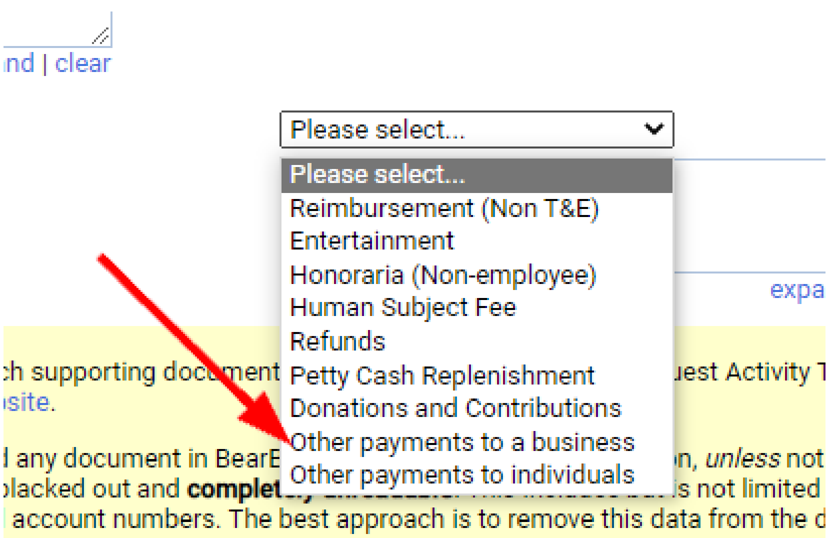
In the Supplier box, start typing the name of the supplier, and a match should pop up that you can click on:



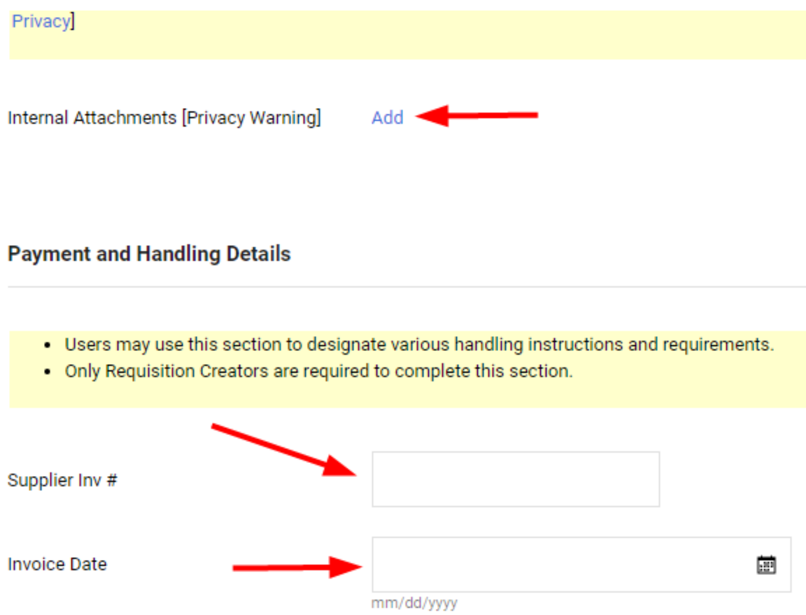
Scroll down to Payment Request Items and fill in the Item, Unit Price, and Quantity fields:



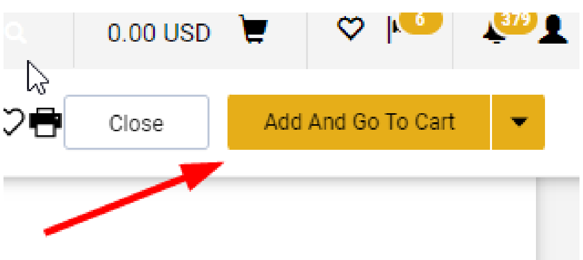
From the Activity Type drop-down menu, choose Other Payments to a Business:



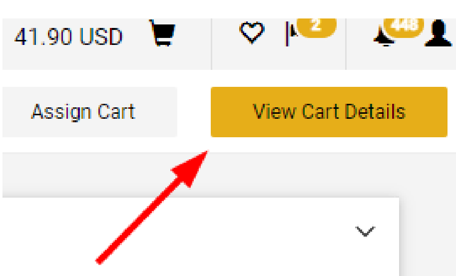
Use the Add button by Internal Attachments to attach your invoice (please note, for dining invoices, you should also use this button to attach the Entertainment form), and then enter the invoice number and date in the Payment and Handling Details section:



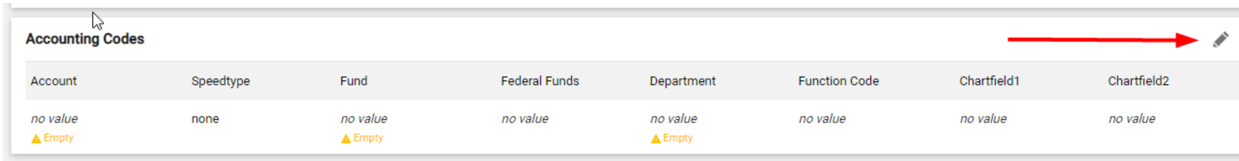
In the top right corner, click Add And Go To Cart:



In the next screen, click View Cart Details:

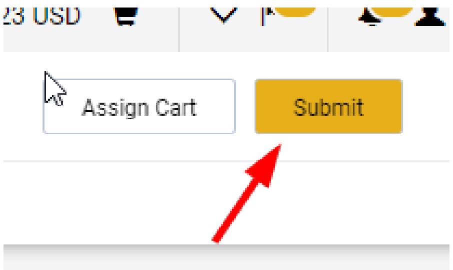


In the next screen, scroll down to the Accounting Codes section and click on the little pencil icon on the right:



Enter your chartstring info and click Save. (If you aren't sure what info goes into what fields, please contact us at physi-finance@lists.berkeley.edu for assistance.)

In the top right corner, click Submit:



(If someone else is in charge of designating a chartstring for you, or if someone else needs to review your cart before it's submitted, you can click Assign Cart here instead, and search for their name.)