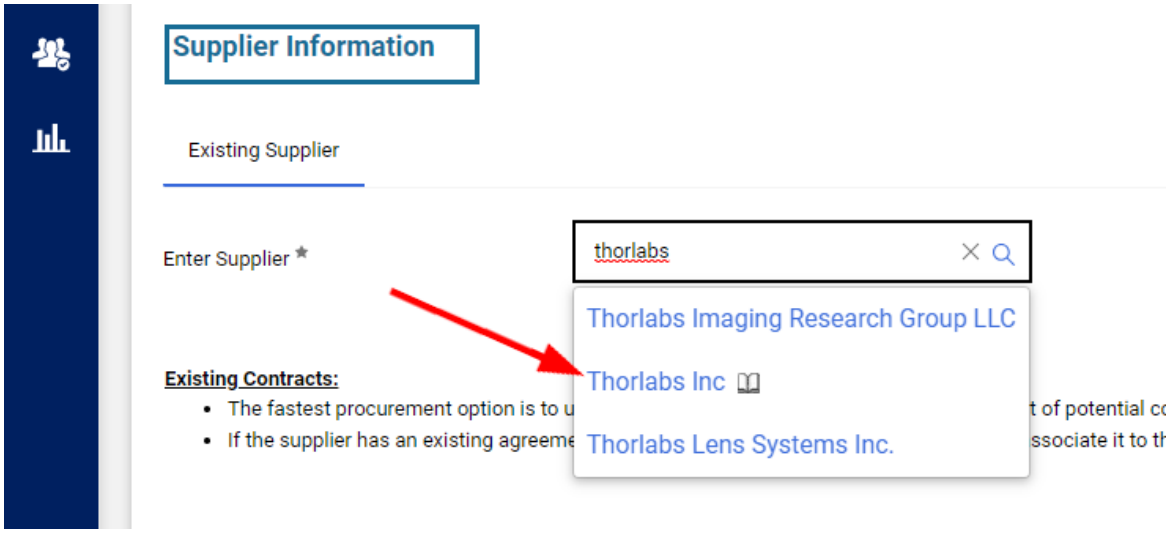
Placing Non-Catalog Orders in BearBuy

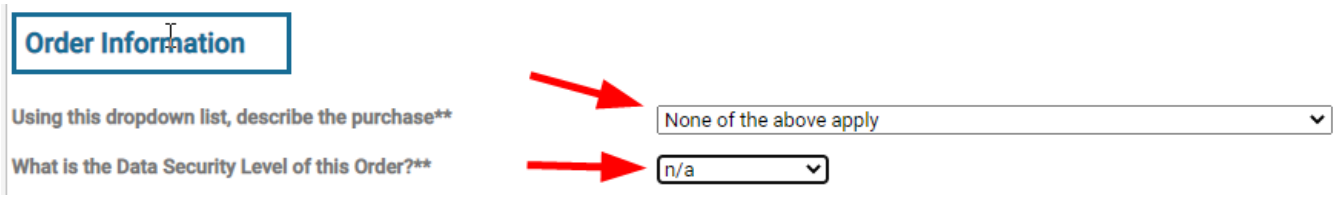
You can find a lot of lab supplies, computer supplies and equipment, and office supplies from our contracted vendors (also referred to as “catalog vendors”) by searching the BearBuy catalog. From the home page, you can try entering search terms in the search box at the top of the page. You can add items 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. (This is also the case for “punch-out” catalogs, where clicking on the tile on the BearBuy home screen opens an online shopping website, where you can put together a cart and have the items put in your BearBuy cart.)

For supplies and equipment that are not found in the BearBuy catalog, you’ll need to use the Non-Catalog Items form. It can be found on the home page, under Frequently Used Forms. After you click to open it, scroll down to 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 at physi-finance@lists.berkeley.edu.



For the majority of your orders for lab supplies, hardware, etc., you can answer the conflict of interest question with No (but if you are concerned about a conflict of interest, contact us at physi-finance@lists.berkeley.edu for guidance):

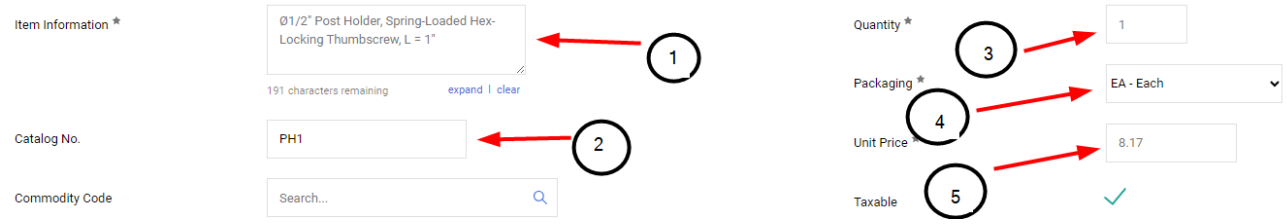
Then in the Order Information section, select these answers from the drop-down menus:



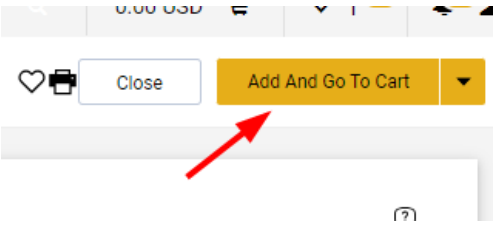
Continuing down the form:

1. Enter a description of the item (a description from the vendor's website works best) in Item Information
2. Enter a catalog or part number if there is one
3. Quantity
4. If you happen to notice on the site that the item is sold by the pack, or by length, etc., then you can select that unit of measurement from the Packaging drop-down menu – but it's also generally okay to just leave this on the default "EA."
5. Price

Do make sure to leave the Taxable box checked. (Yes, our orders are taxable.)

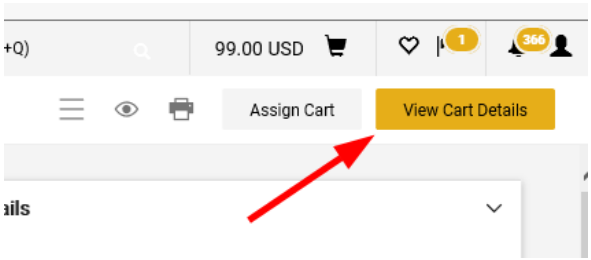


Scroll back up to the top. If this first item is the only thing you're ordering, then click *Add and Go to Cart*. If you have a list of things you're ordering, click the little down arrow on the right and select *Add to Cart* instead. This will add the first item to your cart, and also leave you within the form, with all the information you've entered intact. Scroll down to the Item Information field and delete the info for the first item, and paste in the info for your second item, and then do the same for the Catalog No., Quantity, and Unit Price fields, then go up top and *Add to Cart* again. Repeat this process until you get to your last item, and click the little down arrow again and select *Add and Go to Cart*. (For very long lists of items, this process can be tedious, but unfortunately, it's necessary. Copy-and-paste should minimize the difficulty somewhat.)

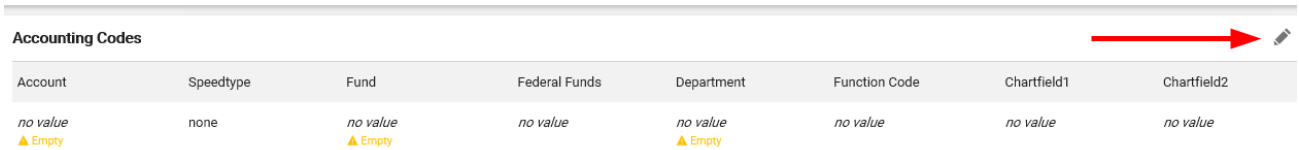


Please note: if you're working from a quote that lists shipping charges and sales tax, don't try to include those amounts as line items in your cart. The PO that's sent to the vendor will instruct them on processing those costs.

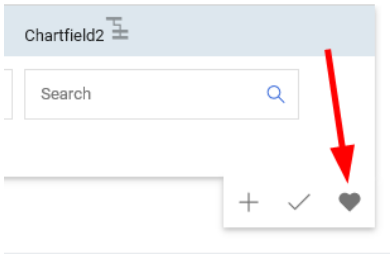
The next screen will show a summary of what you've put in your cart. To enter your chartstring or speedtype, click on *View Cart Details*.



Then scroll down until you see the Accounting Codes section, and click on the little pencil icon to the right:

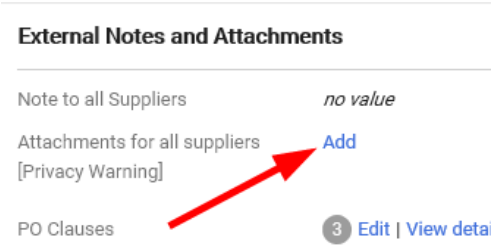


If you entered any speedtypes or chartstrings while setting up your profile, you can click on the little heart icon to bring up a list:

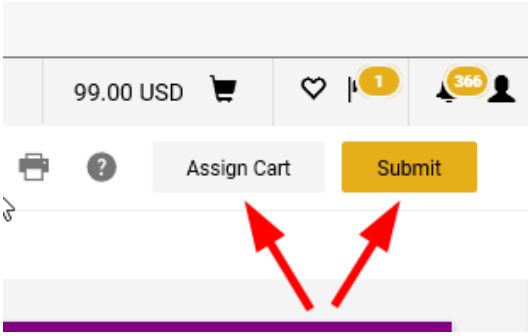


Click on the one you want, and the chartstring will populate the appropriate fields. Otherwise, enter the chartstring or speedtype in this section manually. If you're not sure which values go in which fields, contact us at physi-finance@lists.berkeley.edu. (*Note: the Speedtype field cannot be left blank! 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.