Placing bluCard Orders in BearBuy

Follow this procedure if you need to place an order for items from a vendor who requires payment by credit card. If you’re not sure whether a vendor should be paid by credit card or Purchase Order, please contact us at physi-finance@lists.berkeley.edu.

Start by opening the Non-Catalog Items form. It can be found on the home page, under Frequently Used Forms. Scroll down a bit and in the Enter Supplier box, type in “bluCard,” and BluCard Tracking should pop up. Click on that.

Next, answer “No” to the question about a conflict of interest (unless you suspect that there might be one, in which case, contact us at physi-finance@lists.berkeley.edu for guidance):

Then scroll down to Order Information section. For most of your orders, you can answer the questions with the drop-down menus like this:

Continuing down the form:

1. Enter a description of the item (the wording from the vendor’s website works best) in Item Information
2. Enter a catalog or part number if there is one
3. Quantity
4. Price
If this item is something that can be purchased from the vendor’s website, then scroll down to the very bottom of the form and click Add Attachments under Internal Attachments:

Click the radio button for Link, and put the address in the URL box, then Save:

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 short list of things you’re ordering (five or fewer items), click on 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 add the link (if any) for this next item; then go up top and Add to Cart again. Repeat this process until you get to your last item, and change the menu selection back to Add and go to Cart, and click it.

(If the items can’t be ordered from the vendor’s website, then attach a quote or whatever other information you have that will help CSS contact the vendor and place the order.)

For extremely long lists of items, you can just fill out the form once, putting “See attached” in the Item Information box, and then the total cost of all the merchandise in Unit Price, with a quantity of 1. You must then provide either a link or an attachment that will allow CSS to easily bring up your order on the vendor’s website, with complete info for each item. Don’t leave CSS with the task of trying to recreate your order by searching for all of your items on the vendor’s website. This creates the possibility of many errors.

(Please note: if you’re working from a quote that lists shipping charges and sales tax, don’t bother to include those amounts as line items in your cart, it’s not necessary.)

After you’ve finished entering your items and have clicked Add and go to Cart, the next screen will show a summary of what you’ve put in your cart. To enter your chartstring or speedtype, first 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 saved 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.

Once you’ve entered your chartstring or speedtype and attached any relevant documents, go to the Comments tab of your cart and leave a comment saying “CSS: please place this order with one of your bluCards.” Then 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, CSS will place your order with one of their bluCards.

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.