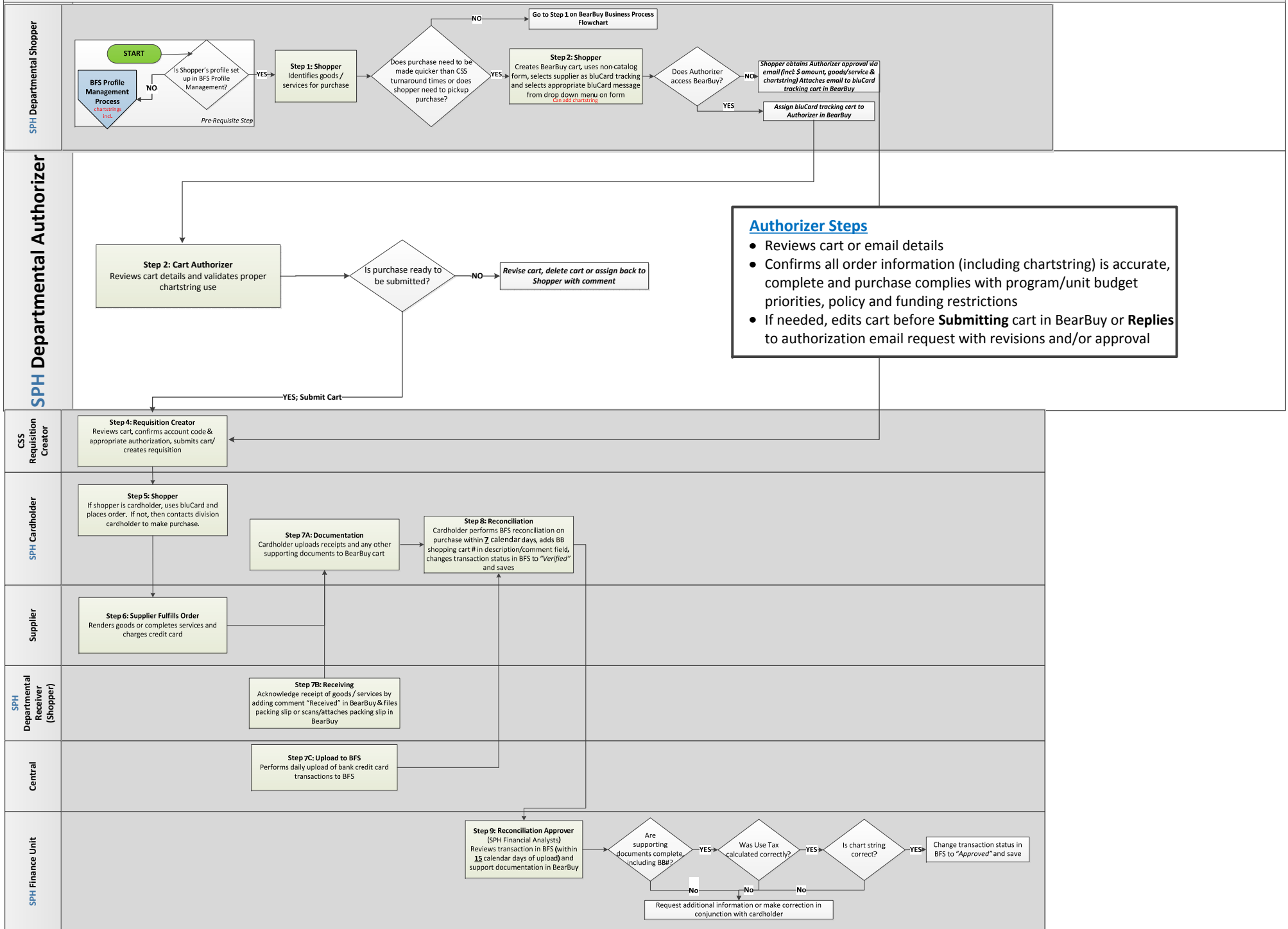
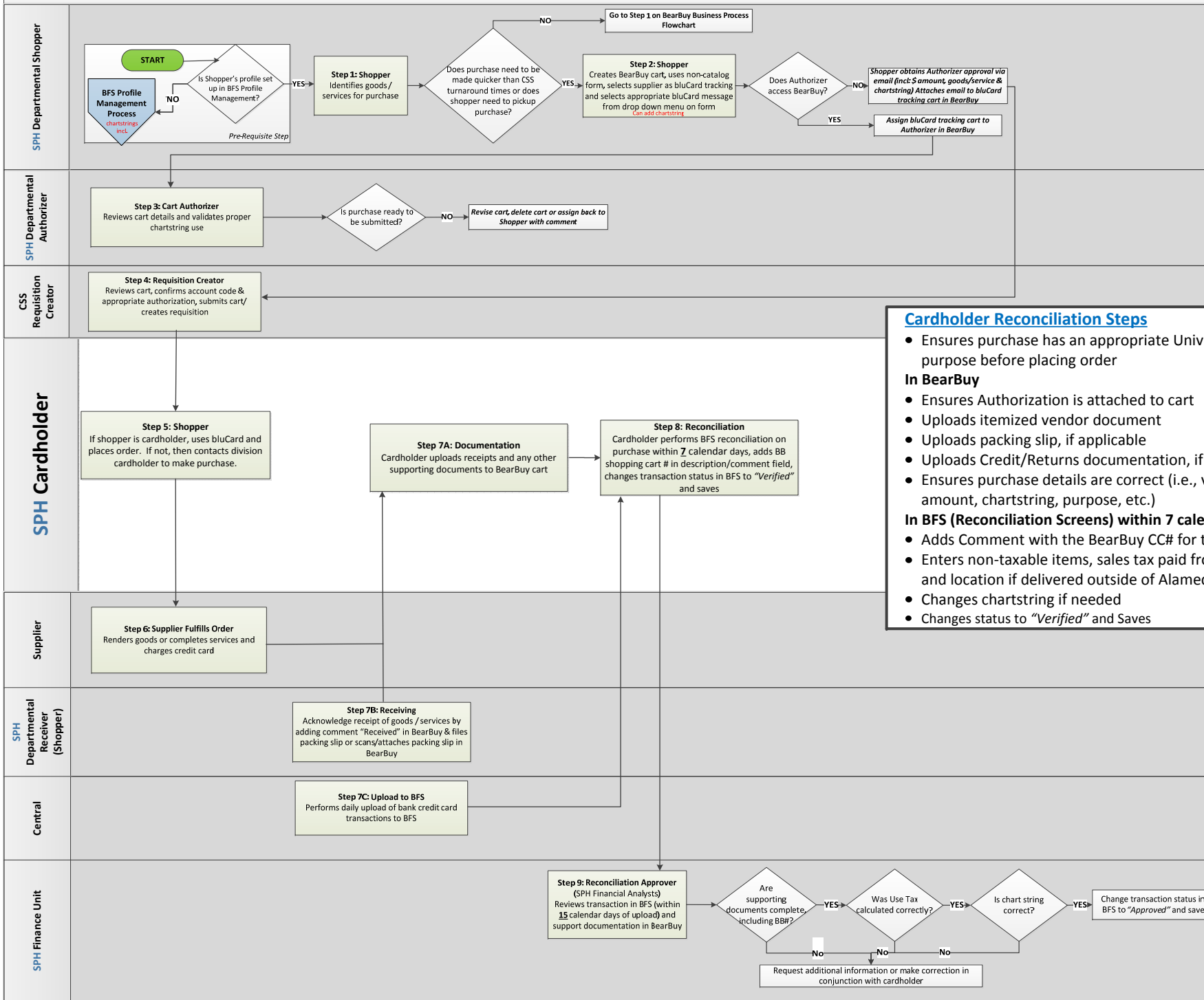


Shopper Steps

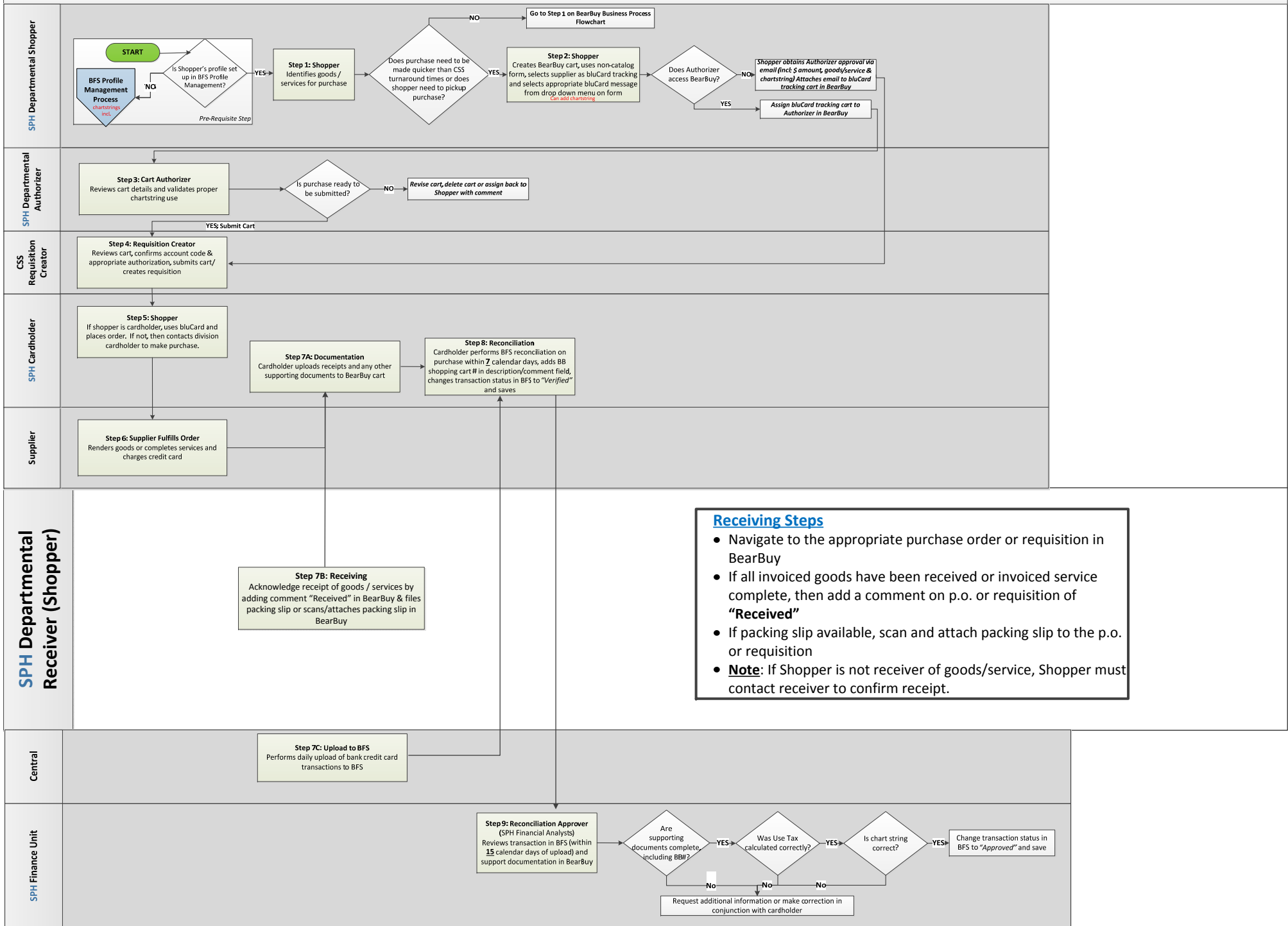
- Staff, faculty, student employees may all be Shoppers
- Determine if CSS has enough time to make purchase (standard CSS turnaround time is 24-48 hours or sooner if cart is marked urgent – reserved for truly urgent purchases)
- If there is not enough time for CSS to make purchase or purchase needs to be picked up, then Shopper creates BearBuy cart using non-catalog form and selects “bluCard tracking” as the vendor
- Shopper will need to select the appropriate bluCard message from the drop-down so CSS will know whether or not the purchase still needs to be made
- See *BearBuy User Reference Guide* for other step by step shopping instructions
- Shopper checks SPH org chart to identify the Authorizer for his/her unit
- If Authorizer uses BearBuy then **Assign** cart to Cart Authorizer
- If Authorizer does not use BearBuy then obtain authorization for purchase from Authorizer via email, attach email to cart and **Submit** cart





Cardholder Reconciliation Steps

- Ensures purchase has an appropriate University business purpose before placing order
- In BearBuy**
 - Ensures Authorization is attached to cart
 - Uploads itemized vendor document
 - Uploads packing slip, if applicable
 - Uploads Credit>Returns documentation, if applicable
 - Ensures purchase details are correct (i.e., vendor name, amount, chartstring, purpose, etc.)
- In BFS (Reconciliation Screens) within 7 calendar days**
 - Adds Comment with the BearBuy CC# for the transactions
 - Enters non-taxable items, sales tax paid from itemized receipt and location if delivered outside of Alameda county
 - Changes chartstring if needed
 - Changes status to "Verified" and Saves



Receiving Steps

- Navigate to the appropriate purchase order or requisition in BearBuy
- If all invoiced goods have been received or invoiced service complete, then add a comment on p.o. or requisition of **"Received"**
- If packing slip available, scan and attach packing slip to the p.o. or requisition
- **Note:** If Shopper is not receiver of goods/service, Shopper must contact receiver to confirm receipt.