CQADM & CPACA BearBuy Business Process

**Step 1:** Shopper
- Creates cart and enters goods/services
- Does Authorizer access BearBuy?
  - Yes: Assign cart to Authorizer in BearBuy
  - No: Review cart, delete cart or assign back to Shopper with comment
- Shopper obtains Authorizer approval via email (incl. $ amount, goods/service & chartstring) Attaches email to cart in BearBuy, submits cart.

**Step 2:** Cart Authorizer
- Reviews cart details and validates proper chartstring use
- Is purchase ready to be submitted?
  - No: Review cart, delete cart or assign back to Shopper with comment
  - Yes: Submit Cart

**Step 3:** Requisition Creator
- Reviews cart, confirms account code and appropriate authorization, submits cart/creates requisition

**Step 4:** Chartfield 1 Approver
- Chartfield 1 in account string has Approver (Financial Analyst) set in BFS

**Step 5:** Requisition Approver
- Reviews and approves requisition

**Step 6:** Buyer Approver
- Routes based on Org Node, PR Value and if central approval is required
  - YES: Requires Buyer Approval?
    - NO: Is purchase ready to be submitted?
      - No: Review cart, delete cart or assign back to Shopper with comment
      - Yes: Submit Cart
    - YES: Assign cart to Authorizer in BearBuy
- Service, After the Fact, Subaward, Payment Request or Over Self Approval limit of $1k?
  - No: Routes based on Org Node, PR Value and if central approval is required
  - Yes: Requires Buyer Approval?
    - NO: Is purchase ready to be submitted?
      - No: Review cart, delete cart or assign back to Shopper with comment
      - Yes: Submit Cart
    - YES: Assign cart to Authorizer in BearBuy
- Invoice Matched to PO.
  - YES: Match Exception?
    - NO: Is the Voucher greater than $1,000?
      - NO: Invoice Matched to PO: Match Exception?
        - NO: Invoice to PO for amt and qty
          - YES: Invoice Matched to PO: Match Exception?
            - NO: Match Exception Process
              - If the Match Exception is force matched
  - YES: Match Exception Approval

**Step 7:** Dispatch
- PO created and sent to Vendor, funds encumbered; BFS updated.
- Step 8: Supplier Fulfills Order
  - Renders goods or completes services and issues invoice
- Receiving
  - Acknowledge receipt of goods/services by adding comment “Received, okay to pay” in BearBuy & files packing slip or scans/attaches packing slip in BearBuy

**Step 9:** Voucher Approval
- Paid based on payment terms

**Step 10:** Invoice Processing
- Scan invoice and create voucher or electronic invoice

**Step 11:** Auto-matches Invoice to PO for amt and qty
- Invoice Matched to PO: Match Exception?
  - NO: Invoice Matched to PO: Match Exception?
    - NO: Match Exception Process
      - If the Match Exception is force matched

**Step 12a:** Match Exceptions
- Step 12b: Match Exception Approval
- If the Match Exception is force matched

**Step 13:** Voucher Export
- Paid based on payment terms
**Shopper Steps**
- Staff, faculty, student employees may all be Shoppers.
- Shopper enters purchase requests into BearBuy via the shopping cart. See BearBuy User Reference Guide for 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.
BearBuy AUTHORIZER Steps

Step 2: Cart Authorizer
Reviews cart details and validates proper chartstring use

Is purchase ready to be submitted?

YES; Submit Cart

NO

Revise cart, delete cart or assign back to Shopper with comment

Authorizer Steps
- Reviews cart or email details
- Confirms all order information (including chartstring) is accurate, complete and purchase complies with program/unit budget priorities, policy and funding requirements
- If needed, edits cart before Submitting cart in BearBuy or Replies to authorization email request with revisions and/or approval
Approver Steps

- Confirms all order documentation is complete and purchase complies with policy and funding requirements
- Obtains any clarifying information/documentation from Shopper to review the purchase
- Follows instructions to complete approval step in BearBuy:

http://supplychain.berkeley.edu/sites/default/files/Requisition%20Approver%20092014.pdf
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, okay to pay”
- 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.